

Financial Services Cloud

Learn how using AI to make finance simpler, smoother, and more in tune with you



Improve Client Interaction & Efficiency

Goal	Use Case	Persona
Improve CSAT by analyzing client sentiment	Analyze client sentiment summary based on past interactions to enhance CSAT	Financial Advisor, Client Services
Avoid red accounts by determining client intent	Resolve concerns faster by analyzing customer intent in chat/emails	Financial Advisor, Client Services
Serve better with unified overview of client holdings	Create a 360° overview of accounts and client holdings that goes beyond regular reports	Financial Advisor, Client Services
Stay updated on client life events with real time event alerts	Get real-time alerts based on life events or investment maturities	Financial Advisor, Client Services
Save time by auto-generating email drafts	Generate personalized context-aware email drafts	Financial Advisor, Client Services
Eliminate grunt work by auto-summarizing interactions	Auto-generate summaries of chat interactions to provide better service	Financial Advisor, Client Services