

SOLUTION OVERVIEW

Deliver personalized, connected experiences for retail bank customers

Power digital engagements with an omnichannel experience platform



Delight customers with personalized, relevant interactions



Deliver frictionless, consistent omnichannel experiences at scale



Provide customer journeys to reduce churn



Build operational efficiency and agility to reduce costs

Retail banking is all about delivering customer relationships, with each and every interaction shaping the overall customer experience. The easier and more personalized the engagement, the more likely the customer will come back. Yet, disparate technologies and siloed content challenge retail banks to connect customer journeys across all critical touchpoints, leading to disjointed experiences and an increased risk of customer churn.

Retail banks are on the hook to create continuous, meaningful digital experiences to transform how they initiate, nurture and maintain customer relationships. Connecting all components of the customer journey requires bringing relevant content to the core of every interaction, creating real-time contextual engagements based on customer activity, engagements, preferences and priorities.

Success story

BlueShore Financial built a business around targeting customers with tailored and personalized communications and financial solutions, yet its outdated banking system and manual printed approaches were falling short. With OpenText™ Exstream™, the bank has a single platform to produce, manage and deliver meaningful content and communications, better meeting customers' needs, reducing inbound customer service calls and improving marketing returns.

BlueShore Financial has experienced efficiency gains across the board, such as being able to generate more than 28,000 customer statement files in just 30 minutes and easily create in-branch materials on demand. "Exstream's capabilities enable us to provide our clients with relevant targeted marketing materials on demand, driving the desire for more products and services, and further boosting revenue and loyalty," said Fred Cook, CIO with BlueShore Financial.

[Read the Success story](#)

Leveraging digital experience technology accelerates an organization's ability to create superior, personalized experiences that customers expect and demand. By bridging systems of engagement with existing systems of record—and connecting content, communication and insights—banks get to know customers on a deeper level, fostering long-term satisfaction and loyalty.

Delight customers

Customers expect banks to know their preferences and priorities. With a comprehensive digital experience platform, retail banks deliver personalized engagements that resonate with customers. Tailor communications and content based on data-driven insights of individual requirements to boost engagements and build brand and product advocates.

Deliver frictionless, consistent omnichannel experiences

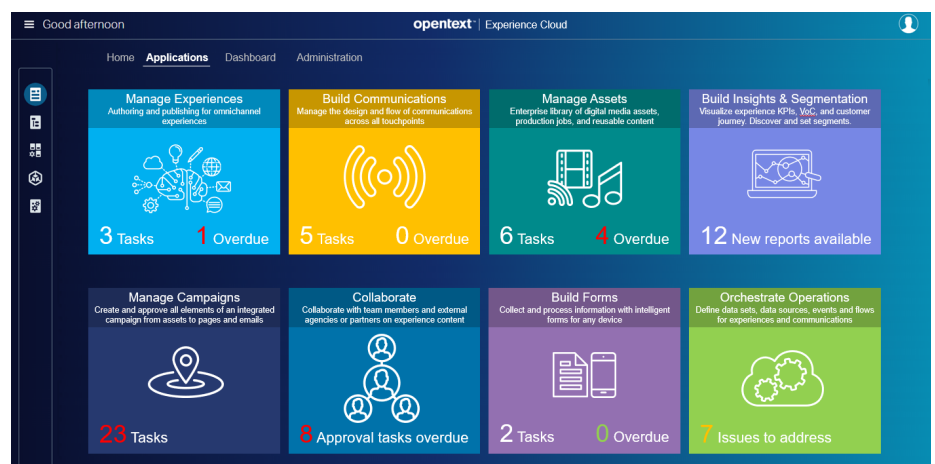
Customers want anytime, anywhere connections that are quick, simple and engaging. Effective omnichannel customer communication management taps into multiple data sources to gain a single-pane view of the customer, delivering consistent experiences across every channel, every time. By leveraging collective insight into cross-channel interactions, banks can uncover opportunities, streamline bottlenecks and drive sales. Plus, banks can empower customers with easy self-service access to their accounts, on any device, to expedite transactions.

Provide customer journeys

Building customer loyalty comes down to establishing a personal connection that benefits the customer. A digital experience platform uses consumer data to proactively identify when customers are ripe for specific information and resources, supporting in-the-moment guidance to best support the customer journey. Integrating data from any system, banks achieve visibility into customer preferences to make custom-tailored offers to upsell or cross sell, maximizing customer lifetime value.

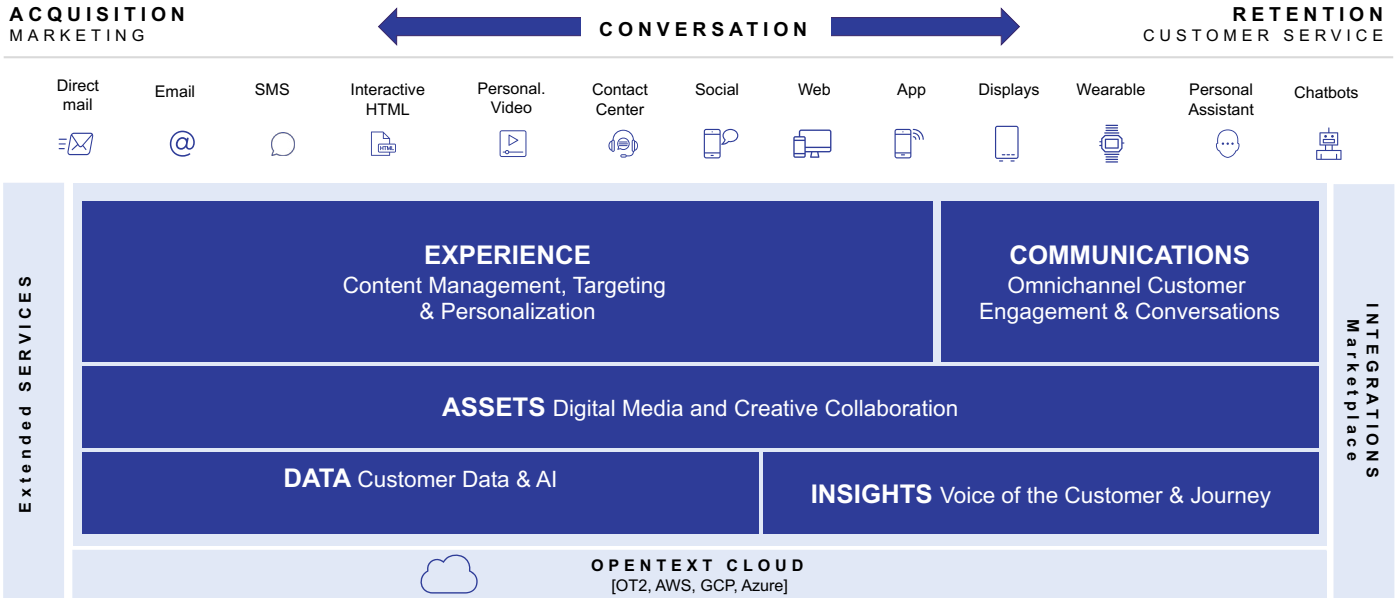
Build operational efficiency and agility

Digital experience technology provides critical visibility into operations and enables banks to quickly adapt to changing customer needs. By transforming into a digital, data-driven business through a content-centric approach backed by automation, banks optimize operations and reduce risk.



DXP for Retail Banking features a unified UX that provides insights and access

OpenText Digital Experience



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Solution components

OpenText Exstream™ Transform customer communications into exceptional experiences.

OpenText™ TeamSite™ Deliver personalized omnichannel digital experiences.

OpenText™ Media Management Manage images, videos and rich media across the enterprise.

Optional components

OpenText™ Explore Discover valuable insights in a Voice of the Customer solution.

OpenText™ Qfiniti Transform call center and back office performance.

OpenText™ LiquidOffice™ Create, publish and process forms with a powerful forms automation solution.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://www.opentext.com).

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