

SOLUTION OVERVIEW

# OpenText Customer Information Management for Banking

Bring sales and service innovation to banking



**Uplift** operational experience to improve efficiency



**Empower** employees to focus on customers



**Deliver** frictionless customer interactions



**Enforce** governance and risk management

**For banks to maintain a competitive edge, they must meet the rising expectations of customers for faster, digital engagements. To remain effective and secure, they must also address the growing prevalence of remote and hybrid workforces and evolving regulations by streamlining operations.**

Financial Services institutions must consistently provide timely, frictionless, intuitive, reliable, relevant, and efficient customer experiences seamlessly through all delivery channels. When data is scattered across multiple systems and business lines, limiting insights into the complete customer view and their relationship with the bank, customer engagements suffer. Information silos and disparate systems lead to service delays, inaccuracies, and friction.

OpenText™ Customer Information Management for Banking provides a comprehensive 360-degree view of the customer, enabling consistent and uniform sales and service interactions across the entire organization and ecosystem. It consolidates both internal and external documents into a centralized platform, streamlining the integration of data and content within business processes. In combination with AI-powered capture technology and compliant archiving, these capabilities grant banks a singular, trusted source of information. This enables personalized customer engagements, fosters improved collaboration, simplifies audit and compliance reporting, and drives operational efficiency.

## **Uplift operational experience through integration**

The solution allows banks to seamlessly integrate with tools that employees use every day to give them access to relevant customer information when and where it's needed. Sales and service teams can collaborate to efficiently handle customer onboarding and issue resolution processes with minimal friction. Effective content management provides a complete 360-degree customer view and ensures operational efficiency with appropriate access to relevant customer data for all departments (sales, front office to back office, and beyond) quickly, easily, and from anywhere.

## **Empower employees through automation**

Banks can process incoming communications and content with AI-augmented intelligent capture tools to deliver efficient customer tracking and ensure customer requests get actioned quickly and consistently. Customer Information Management for Banking also enables increased productivity and agility so employees can focus resources on value-added tasks and consultative engagements, instead of routine or low-value administration. With the right customer information in hand, sales and service teams can identify buying habits and upsell opportunities to increase wallet share.

## **Deliver frictionless customer engagements**

When a customer contacts their bank, they expect the engagement to be frictionless, regardless of the channel used or the department contacted. Even simple inquiries, such as requests for change of address, list of latest transactions, status of mortgage application, or reporting a fraudulent transaction, should leave customers feeling valued and boost their trust. Engagements should always be seamless and intelligent to deliver lasting positive impressions.

## **Enforce governance and risk management**

Customer Information Management for Banking supports compliance and governance while enabling banks to keep data up to date and accessible for daily operations. It eases document collection while allowing users to access and search from anywhere to support internal and external audits. A modern archiving solution will keep historical content stored in line with compliance requirements while enabling secure access to content needed for everyday tasks.



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## Customer information management solution components

### OpenText™ Extended ECM for Salesforce

Integrate with a central content management platform with Salesforce CRM to automate processes and maximize efficiency

### OpenText™ Extended ECM for Microsoft Dynamics 365® Customer Engagement

Reduce sales cycles, optimize customer and field service, and build customer loyalty

### OpenText™ Intelligent Capture

Automate process initiation across departments with a single platform

### OpenText™ AppWorks™

Build digital business applications at digital speed

### OpenText™ InfoArchive

Accelerate cloud transition, optimize infrastructure, and ensure compliance with a modern archiving 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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