

# OpenText Customer Information Management for Banking

Knowledge reimagined for consistent, trustworthy customer experiences



## Benefits

- Digitally transform without sacrificing customer satisfaction
- Go beyond data organization with AI
- Handle sensitive customer information to build and maintain trust
- Enforce governance and risk management

Meeting financial goals can be daunting for customers—banking interactions shouldn't add to the complexity. Banking customers expect consistent and reliable service, regardless of the channel used or the department contacted.

Entrusting an institution with their financial goals is one of the most important decisions your customers will ever make. When addressing customer inquiries and concerns, bank employees must demonstrate trustworthiness through their knowledge of that customer's history, preferences, and needs. To make that possible, banks must remove complexity and roadblocks from operations to keep employees in the know and in the flow as they help customers navigate financial processes.

Delivering all relevant customer information to bank employees, from customer service representatives, to advisors, to mortgage underwriters, to back-office personnel, helps them deliver consistent, trustworthy, and timely customer interactions. This solution provides a comprehensive view of all customer information, enabling consistent and uniform interactions across the entire organization and ecosystem.

## **Digitally transform without sacrificing customer satisfaction**

The OpenText Customer Information Management for Banking 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. Employees can collaborate to efficiently handle customer onboarding and issue resolution processes with minimal friction. Get a complete 360-degree customer view and ensure 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.

## **Go beyond data organization with AI**

Use AI-powered capture tools to quickly find, extract, and analyze customer data, streamlining service delivery and ensuring every request is handled accurately and efficiently. OpenText 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.

## **Diligently manage sensitive customer information to strengthen and enhance trust**

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**

OpenText Customer Information Management for Banking supports compliance and governance by securely retaining critical customer records 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.



## Resources

[Learn more about Banking industry solutions >](#)

### OpenText Customer Information Management solution components

<b>OpenText Core Content Management Premium plan including:</b>	Bridge information silos, improve processes, and strengthen governance
<b>OpenText Content Aviator</b>	Locate and summarize customer information systematically to act more quickly and knowledgeably
<b>OpenText Core Capture</b>	Automate process initiation across departments with a single platform
<b>OpenText Core Signature</b>	Build digital business applications at digital speed
<b>OpenText Core Process Automation</b>	Accelerate cloud transition, optimize infrastructure, and ensure compliance with a modern archiving solution
<b>OpenText Knowledge Discovery</b>	Leverage key insights stored deep within your unstructured data using AI and machine learning