OpenText Total Experience for Financial Services

Increase customer and employee satisfaction, brand loyalty and revenue growth

Gain customers for life

Empower employees to deliver for customers

Get insight for better decisions

Manage risk and compliance

Mounting customer expectations, a rise in the remote workforce and regulatory changes require Financial Services institutions (FSIs) to optimize operations to remain competitive. FSIs need

opentext™

OpenText Total Experience for Financial Services gives companies the competitive edge to stand out from the pack.

Gain customers for life

Exceptional experiences at all stages of the customer journey build relationships that last. Delight customers by providing rich, relevant and targeted communications across all channels. Enable realtime communications and easily manage new formats, such as images, video, 3D and virtual reality. Optimize customer experiences by testing and targeting communications.

Empower employees to deliver outstanding customer experiences

There is no Customer Experience (CX) without Employee Experience (EX). Provide employees with information when and where it is needed so they can make smarter, faster decisions that deliver a better customer experience. Connect content and processes to enhance collaboration and exception handling on cases—both within and beyond the FSI (customers, brokers and any other third party), enabling employees to stay informed and productive wherever they are. Optimize and automate repeatable business processes to reduce transaction times, expedite customer onboarding processes, ensure consistent execution across departments and free up knowledge workers for higher value activities.

Get insight for better decisions

Fuel customer-facing teams with AI-driven intelligence to anticipate the next best action, next best offer and next best channel throughout the customer journey. Improve customer journeys with real-time analytics and orchestration capabilities. Leverage advanced artificial intelligence and data analytics