

## Financial Services Checklist

Ensure both flexibility and compliance while taking care of customers

### A FULLY INTEGRATED CLOUD COMMUNICATIONS PLATFORM ALLOWS YOUR EMPLOYEES TO SERVE CUSTOMERS FROM WHEREVER, WHILE ALSO SUPPORTING YOUR COMPLIANCE AND SECURITY NEEDS:

- Help customers help themselves with basic needs, like checking an account balance, and free customer service agents to spend time on more complex customer needs.
- Customers always see your business phone number whether your employees are connecting with them from home, via mobile phone, or from the office.
- Your service reps can access real-time customer insights and preserved communications for quick context, helping them deliver more informed responses that shorten times to resolution.
- Audits are manageable when your cloud services provider has security and privacy controls as well as archived records that address FINRA, GDPR, SOC2, Sarbanes-Oxley, and more.



**ONE COMMUNICATIONS PLATFORM - ONE LOW MONTHLY RATE**  
PHONE | VIDEO | CHAT | CONTACT CENTER | FILES | EMAIL

## COMMON ISSUES FACING THE FINANCIAL SERVICES INDUSTRY

- With credit union and mortgage brokers seeking to improve customer satisfaction scores<sup>1</sup>, your communications technology needs to empower service reps to deliver quick, high-value customer service as well as help tech-savvy millennials help themselves.
- Hybrid work models have accelerated digital transformation and require communications and collaborations technology that supports working from wherever—and customer contact from wherever.
- Regular audits and risk management require providers to support compliance requirements.
- The cost efficiency of cloud communications is causing many in the industry to switch out legacy phone systems.

## OUR SOLUTIONS CAN HELP SOLVE THESE ISSUES

	YOUR NEEDS	OUR SOLUTIONS
DELIVER SUPERIOR CUSTOMER EXPERIENCE	<ul style="list-style-type: none"> <li><input type="checkbox"/> Seamless client communications and customer-centric channels</li> <li><input type="checkbox"/> Managing client experiences during workforce changes</li> <li><input type="checkbox"/> Ensuring customer needs are met quickly by the right resource or service rep</li> <li><input type="checkbox"/> Accommodate customers who are digitally native and expect more</li> <li><input type="checkbox"/> Make sure customers don't have to repeat themselves each time they contact you about a single issue</li> <li><input type="checkbox"/> Extend reach and facilitate faster response times for client inquiries</li> </ul>	<ul style="list-style-type: none"> <li>✓ Intermedia Unite integrates voice, chat, and video conferencing interactions on one platform</li> <li>✓ Intermedia Unite Archiving allows managers to bring new hires or backfills up to speed quickly and better serve the client through workforce transitions by providing access to past interactions</li> <li>✓ With Intermedia Contact Center, you can easily customize call flow to assign the right agent at the right time, and QA features deliver exceptional results</li> <li>✓ Turn your customer service capability into an outreach powerhouse with dynamic notifications</li> <li>✓ Contact Center's real-time insights get service reps into context quickly, helping to deliver more informed responses that shorten times to resolution. Plus, deep historical reporting helps improve future interactions.</li> <li>✓ Contact Center dynamic notifications proactively send reminders or any communication while respecting the client's preferences</li> </ul>
MOBILITY AND FLEXIBILITY	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure employees can be productive whether they work at home, in the office, while commuting, or some mix of locations</li> <li><input type="checkbox"/> Give customers a seamless and consistent communications experience across channels and over time</li> <li><input type="checkbox"/> Allow video conferencing participants to join meetings from wherever</li> <li><input type="checkbox"/> Ensure customers receive a consistent experience</li> <li><input type="checkbox"/> Accommodate distributed service rep teams and multiple branch locations</li> </ul>	<ul style="list-style-type: none"> <li>✓ As a tightly integrated platform, Intermedia Unite ensures consistent communications regardless of where your employees are</li> <li>✓ Chat and SMS automatically synchronize across mobile &amp; desktop apps, and real-time customer insights speed service rep-customer interactions</li> <li>✓ Intermedia Unite lets meeting participants join from mobile phones, desktops, laptops</li> <li>✓ Voice, chat, and email queues combine into a single omni-channel experience</li> <li>✓ Anytime, anywhere communications from any device</li> </ul>

	YOUR NEEDS	OUR SOLUTIONS
SECURE CLIENT COMMUNICATIONS AND INDUSTRY COMPLIANCE	<input type="checkbox"/> Manage risk by ensuring cloud service providers are independently audited	✓ Intermedia is SOC 2 audited, which attests to our high security standards—for our products, networks, infrastructure, and privacy protection
	<input type="checkbox"/> Protect or encrypt confidential client correspondence, files, text messages, voicemails, and email	✓ Emails, files, video conference recordings, and more can be secured at rest and while in transit
	<input type="checkbox"/> Share documents securely	✓ Account-level encryption keys secure stored documents, and SSL/TLS secures them as you share them
	<input type="checkbox"/> Choose cloud service providers with high uptime SLAs	✓ Our cloud is purpose-built for 99.999% uptime with a financially backed SLA
	<input type="checkbox"/> Ease the audit process for supporting compliance with industry regulations	✓ Intermedia Unite Archiving offers secure and flexible retention and retrieval of Unite voice, chat and SMS interactions with role-based permissions for accessing archives, as well as optional WORM tamper-proof SEC rule 17a-4
	<input type="checkbox"/> Avoid use of and protect disclosure of employee mobile phone numbers	✓ Callers see your business phone number, whether employees are engaging from their mobile phones, desktop phones, or a remote service location
	<input type="checkbox"/> Have confidence that your cloud services providers take security measures that facilitate regulatory compliance	✓ Intermedia is independently audited and offers security protection across seven pillars
PUT AN END TO LEGACY PHONE SYSTEM COSTS	<input type="checkbox"/> Protect your business files against malware, viruses, and cyber crime	✓ Intermedia Unite quarantines infected files and integrates Sophos anti-malware capability
	<input type="checkbox"/> Ensure cost efficient communications and collaboration without sacrificing quality or features	✓ Intermedia Unite offers 90+ enterprise-grade calling features and excellent network call quality and uptime
	<input type="checkbox"/> Easier configuration and deployment	✓ Flat, per-user rates with no annual contracts, no hidden fees, no hardware to buy, manage install, or replace
	<input type="checkbox"/> Supplement desk phones with other communication channels	✓ A single web-based portal lets you configure the system and manage call reporting
	<input type="checkbox"/> Ensure business continuity	✓ Intermedia Unite tightly integrates desk phones, mobile phones, chat, SMS, video conferencing, screen sharing, file sharing, and file backup to facilitate increased collaboration and productivity
		✓ Intermedia Unite automatically rings all your end points with every call in the event you don't answer and routes the call to any number you choose
		✓ Intermedia Unite automatically rings all your end points with every call in the event

1. [https://www.theacsi.org/index.php?option=com\\_content&view=article&id=149&catid=&Itemid=214&i=Credit+Unions](https://www.theacsi.org/index.php?option=com_content&view=article&id=149&catid=&Itemid=214&i=Credit+Unions)

## QUESTIONS? CONTACT US TODAY!

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