

5 Smart Moves for Financial Services Companies

HOW TO COMPETE & WIN CUSTOMERS

Go!

Win in 5 smart moves.

In Spring 2017, we commissioned an online study in the financial services industry. The goal: To discover how the increasing demand for improved and differentiated customer experiences are being met.

#1 Study your opponents



The top 3 trends affecting your industry today are...

- 1 Regulatory concerns
- 2 Market competition
- 3 Adapting to mobile technologies



Competition is fierce. Financial services companies must get their ideas to market faster.

#2 Rally your team



The biggest challenges in maintaining excellent customer experiences are...

- 17% Coordinating departments
- 15% Ensuring touchpoints are consistent
- 15% Managing consumer expectations

#3 Score customers online



The most important customer touchpoints are...

- 21% Online experience
- 17% Customer Service Center
- 12% Mobile app retail environment



Financial services companies need to move quickly.

#4 Make every move count



Collaboration with teammates is happening via...



Financial services companies need a better way to engage customers and teams.

- Physical meetings
- Emails
- Conference calls

92%

Extremely important

8%

Somewhat important

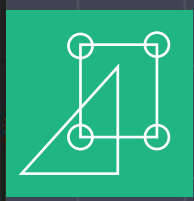
Financial services companies said that delivering a great customer experience is...

#5 Capture the prize



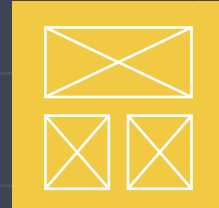
You Win!

B



Our platform is a real game-changer. Bluescape is a visual collaboration software company that helps financial services companies connect disparate teams in a virtual workspace for faster innovation. Stakeholders can see every player's move to research, create, and develop solutions to address customers' needs—to capture more customers for the win.

Catch it in action.



BLUESCAPE

bluescape.com | 1.888.507.0030 | @bluescaper