

How JourneyTEAM Helps Banks and Credit Unions Create a Centralized, Secure, and Personalized Customer Experience



Leverage the power of a modern workplace with a connected Microsoft platform.

Unify Your Business and Disparate Systems



Consolidate your technology stack to eliminate bottlenecks and get a single view into your customer data.



Empower your remote workforce with a cloud-based platform that supports multiple communications channels.



Reduce operating costs and errors with automated features that assist your customer service team.



Safeguard your business and customer data to reduce risk, simplify compliance, and ensure business continuity.



Ensure employees and customers can collaborate easily on any device.

Gain a 360-Degree View of Every Customer



Accelerate resolution times with real-time customer data at the fingertips of call center and front-line employees.



Link your call center and on-premises data to gain a complete picture of your total customer experience.



Readily identify opportunities where you can streamline processes and improve satisfaction.



Generate complete, accurate reports that identify wins, opportunities, and areas for improvement.

Increase Client Satisfaction and Retention



Personalize your customer experience to keep customers happy and loyal.



Capture referrals, conversations, and leads in one central repository—no matter where your employees are located.



Reduce customer waiting times with a seamless platform that facilitates efficient self-service.



Increase your revenue by identifying promotions and upsell and cross-sell opportunities while talking to customers.



Track the impact of sales and marketing campaigns with comprehensive analytics.

Make data-driven decisions with accurate KPIs, including:

- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Net Promoter Score (NPS)
- Average Wait Time (AWT)
- Customer Satisfaction (CSAT)
- Complaint escalations
- Upsell/cross-sell opportunities

Schedule a discovery call with a JourneyTEAM financial services expert today.

833-438-2312

info@journeyteam.com

www.journeyteam.com/
industries/financialservices



Unleash your Potential with JourneyTEAM



Shift to an Experience-based Business Model

As you become less transactional with your customers, you'll develop deeper relationships and gain the critical insights you need to be competitive.



Create a Modern Workplace

Connect all your software systems, simplify upgrades, enable mobility, and strengthen security—even with limited IT resources.



Meet Revenue Targets

Eliminate surprises and stay on track, thanks to predictive analytics that can illuminate opportunities and areas for improvement in real time.

The team financial services professionals trust for solutions, service, and support.

Founded in 1993, JourneyTEAM is an award-winning Microsoft Gold Certified Partner with decades of advanced financial services expertise. We understand the challenges of banks, credit unions, investment banks, and insurance services at the highest level. Let us help you evaluate and implement technology solutions that deliver maximum return on your investment.

We specialize in designing tailored, integrated Microsoft solutions for financial services organizations, including:

- Dynamics 365 Sales and Customer Service
- Dynamics 365 ERP
- Microsoft 365, Microsoft Power BI, Microsoft SharePoint

TAKE THE NEXT STEP IN YOUR JOURNEY

Health and Security Assessment

JourneyTEAM security experts will perform an in-depth checkup of Azure and Microsoft 365 to ensure your business is running a safe, secure, and optimized environment. You receive a detailed report that identifies gaps and provides recommendations for licensing, security, device integrations, and more.

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Maturity Model Assessment

Before you invest in and adopt new business processes and technology, it's important to understand where you are today. JourneyTEAM's objective industry experts will map your organization's technology ecosystem, evaluate your current departmental processes, and provide a detailed roadmap to help you reach your goals.

[LEARN MORE](#)

Need a guide to help you get started?

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