UNBLU FOR

Advisory

How Secure Messenger can help you keep your customer conversations open, interesting and relevant.

Secure Messenger – The primary driver for customer advice and satisfaction

Customer

The customer opens their mobile banking app which gives them access to Secure Messenger. The customer sends their RM a message:

Thanks for the great advice last week!

Relationship Manager (RM)

The RM receives a notification from My Client's App which manages all customer interactions.

The RM has a new recommendation for their customer and replies:

Hi - great to hear from you. I have an opportunity that fits into your strategy. Do you have time for a 30 minutes call?

The customer receives a message notification, but can't speak with the RM at the moment....

This is possible by using the Mobile SDK provided by Unblu.

Hi, I'm on a way to a meeting. I'll let you know when I'm back in the office.

The RM prepares all the information for the meeting.

No problem. I'll prepare an information package for you in the meantime. You'll find it in your private area.

Hours later... The customer is ready for an online meeting

The customer is available, but is now using their laptop.

Hi, I'm back. Do you have time now for a meeting?

Video Call

The RM receives a notification on their desktop indicating the customer is available. The RM suggests a video conference to provide more personal advice.

Video-Calling...

Embedded Co-Browsing

The RM requests a co-browsing session to guide the customer through the information package in their portfolio.

The customer accepts the co-browsing session with their RM.

Universal Co-Browsing

The discussion now involves external websites as part of the discussion. With one click, the agent begins Universal Co-Browsing and proceeds to the specific page.

A virtual browser is now visible to the customer. The agent can open a particular website while the customer follows.

Document Co-browsing

The RM has prepared a document for the discussion and uploads it to the conversation window, sharing the document with the customer.

The customer is not 100% sure about making the investment. Before the call ends, the RM leaves a message with all the information (see below). The customer can review the information at their convenience and then make a final decision.

The call ends

Later, the customer is on the train on their way home, and accesses the mobile app to analyse the information provided by their RM.

I think you're right. This is a great opportunity for me. Let's go for it.

Great. I'll get that moving ASAP.

With the Unblu suite, you have complete control over data flow, data storage and every aspect of the security.

Communicate with your customers in a 100% secure environment. Record every interaction and access them when you or your customers need it (comply with GDPR, Mifid 2).

Notify and inform your customers of their portfolio updates and contract details while keeping your costs under control. (comply with Mifid 2 and your national regulator)