

Strengthen relationships with your financial services clients and enhance team efficiency by connecting through the cloud



AT&T Office@Hand lets financial services businesses unify voice, messaging, and conferencing capabilities in the cloud. That means organizations can deepen customer relationships in today's digital era, and scale to prepare for evolving technologies that will continue to change the landscape of the industry.

Building customer engagement with cloud communications for financial services firms

In this rapidly evolving digital era, the financial services industry is feeling the pressure. Customers today demand the ability to engage with you instantaneously across multiple channels and devices. That's not all. Organizations face more rigorous compliance and risk-mitigation standards to protect consumer privacy and data.

These forces are pushing savvy companies to seek proven technology partners who can provide highly secure, virtually seamless solutions to get ahead in an extremely competitive, constantly shifting landscape. Even for motivated organizations, however, the path to successfully and nimbly building customer relationships through omnichannel solutions that support regulatory compliance has several challenges.

Challenge #1: Creating customer loyalty in a mobile, digital world

Retaining financial customers has never been more difficult. In the digital era, delays of mere seconds can cost millions, because the slightest friction can drive customers to competitors. And if you fall behind in offering the latest options or products you lose customers.

In order to deliver on high customer expectations in a manner that drives revenue and growth, you need to be a disruptor. You need to think differently, use innovative systems, and develop new approaches to creating a personalized, engaging customer experience. The knowledge and know-how to drive disruptive, productive change, however, is typically not inside your organization. Where can you turn to for help?

Solution #1: Exceed customer expectations

AT&T Office@Hand allows you to connect with customers on a highly reliable platform, troubleshoot in near-real time, enhance accurate routing, analyze your inbound and outbound call volume, and more. It's even designed to keep working through natural disasters. In the increasingly digital, competitive world of financial services, delivering a virtually flawless customer experience is the key to success.

With AT&T Office@Hand's cloud-based communications solution, you can deepen customer relationships in today's digital era, while simultaneously preparing for whatever comes next—in an efficient, cost-effective, highly secure way.

72% of all banking transactions are now digital (online or mobile)

Sources: <https://www.fisglobal.com/pace/us-consumer#Mobile-Main-Branch> <https://www.idg.com/tools-for-marketers/2018-cloud-computing-survey>



46% of financial institutions are feeling pressure to fully move to the cloud

Sources: <https://www.fisglobal.com/pace/us-consumer#Mobile-Main-Branch> <https://www.idg.com/tools-for-marketers/2018-cloud-computing-survey>

Challenge #2: Driving innovation while maintaining trust and reputation

So, if you invest in technology, you solve the problem, right? But what if you choose the wrong technology? Perhaps a brand-new service that fails? Or a company that doesn't quite deliver what you wanted? Then, you lose not only customers, but also trust, reputation, and invested resources. It's no wonder that many companies today opt to get by with what they have, even as they sense their competitive advantage beginning to erode.

Solution #2: Trust in a platform ready for financial services

AT&T Office@Hand is highly secure, resilient, and available and helps meet regulatory compliance rules for your shared and stored data. A highly secure and reliable cloud communications system can help defend your data across virtually all endpoints and locations, as well as in transmission. Call recordings, call logs, fax exchanges, SMS, MMS, audio and web conferencing, and team messaging communications are in compliance with applicable cybersecurity controls of the Financial Industry Regulatory Authority (FINRA).

You can also support 24/7 business continuity for your company. AT&T Office@Hand's technology and network have created a fully redundant infrastructure that provides financial organizations with a communications system that's able to weather and function in natural disasters.



To stay competitive, financial services companies must now view communications as a central feature in a robust digital strategy—which is precisely the principle that AT&T Office@Hand was built upon.

Challenge #3: Creating a digital strategy to drive business efficiencies

Financial services organizations know they need to change to succeed in the new landscape. But without proper context, “change” is ambiguous, and ambiguity can lead to resistance, particularly in a highly risk-averse industry. To encourage action, decision-makers need a specific picture of what digital transformation entails. What does a platform migration really look like? What type and amount of resources is a change going to take? What risks are on the table? Without clarity on those issues, it can be difficult to build consensus and momentum among stakeholders to move forward with any transition.

Solution #3: Streamline communications

Consolidating communications on a single, secure, modern platform with AT&T Office@Hand will help you operate with enhanced efficiency while creating greater capacity for innovation. Your digital strategy and solutions should create a better system of connecting customers, partners, and employees. The communications requirements necessary to reach customers while supporting an ever-more mobile and connected workforce are beyond the PBX capabilities of a decade ago.

AT&T Office@Hand simplifies equipment, management, service, and the ability to scale while also supporting end-user productivity. Future cost and communication efficiencies are built in—adding additional locations and users is a quick, repeatable, scalable process.

Why AT&T

AT&T can identify and implement the technologies and services you need—from one edge of your business to the other—to create an experience that keeps customers coming back. We offer the expertise and support you need to transform your financial services business.

For more information about AT&T Office@Hand, visit us at www.att.com/office-at-hand.