

Strategic Engagement: helping banks get the most out of their Finastra software solutions

Finastra’s state-of-the-art support model ensures a seamless, collaborative relationship

“*Strategic Engagement provides proactive, personalized customer advocacy designed to ensure you meet your evolving objectives throughout every phase of the customer lifecycle.*”

Lisa Pierce
Senior Director, Customer Support, Finastra

Challenges:

Even state-of-the-art technology cannot optimize success if you are not adequately prepared to leverage all its built-in capabilities.

- Banks may need proactive support for implementation, training, and solution management rather than strictly reactive problem solving
- Adapting to rapid market and technology changes, escalating risk, and product enhancements in a timely fashion may overwhelm internal resources
- Insufficient familiarity with system capabilities may lead to suboptimal success and underdelivering on strategic plans
- The costs of implementation and service support are not easily predictable and therefore budgeting may be a challenge

Solution:

Strategic Engagement combines an AI engine for common inquiries and a premium personal support team of subject matter experts that ensure your services support your strategic objectives

- We conduct regular meetings with you to ensure you understand all aspects of your solutions and they are fully optimized for efficiency, speed to close, and profitability
- We provide 1:1 expert sessions and priority case management to keep you a step ahead of your competition
- We proactively support system health and assist with releases of new functionality
- We deliver on-prem and virtual training to maximize utility and your investment
- Strategic Engagement is a subscription-based service that provides up-front pricing

Value-added services:

Personalized Support	Strategic Engagement
Online Case Management	✓
Access to a global advisory pool of experts	✓
Priority Case Management	✓
Tailored Support	✓

Proactive Support Services	Strategic Engagement
System Diagnostics	✓
Configuration Diagnostics	✓*
Adoption Diagnostics	✓

Enablement	Strategic Engagement
Knowledge Portal access for guided and self-guided learning	✓
eLearning access	✓*

“*We’re with you every step of the way, ensuring your services are installed on time and as promised, your teams are trained to enjoy the benefits of compliance certainty and efficiency, your questions and concerns are promptly addressed and your services are consistently available to meet your exacting requirements.*”

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Let’s Talk