

Preferred Active Support: helping financial institutions get the most out of their Finastra software solutions

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

“Preferred Active Support 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 and Credit Unions benefit from proactive, long-term support focused on driving sustained value. This includes ongoing guidance, best-practice adoption, and dedicated solution governance, paired with an active partnership that ensures the solution evolves and is continuously optimized to drive long-term client success.
- 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:

Preferred Active Support 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 deliver Product Optimization Reviews to help maintain system health and equip clients with insight into upcoming functionality
- We offer priority support, reducing standard wait times
- Preferred Active Support is a subscription-based service that provides up-front pricing

Value-added services:

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

System Optimization Services	Preferred Active Support
System Diagnostics	✓
Configuration Diagnostics	✓
Adoption Diagnostics	✓

Enablement Resources*	Preferred Active Support
Knowledge Portal access for guided and self-guided learning	✓
eLearning access	✓

*Availability varies by product offering and is included in select tiers.

“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