

SmartCOMM™ for Salesforce Financial Services

A SMART Integration for Enterprise Document Generation and Customer Communications Delivery

Financial Services institutions are constantly challenged, particularly in markets with uncertain interest rates and growing competition. Retaining customers and fending off competitors requires exceptional digital experiences and customer service. One mistake can cost a client, but managing relationships through Salesforce provides the necessary insights to prevent errors. With data management in place, focus can now shift to enhancing customer experiences.

Delivering More Than Just a Document

SmartCOMM from Smart Communications is an industry-leading, cloud-based document generation (DocGen) and customer communications management (CCM) solution that directly integrates with Salesforce Cloud platforms for a seamless user and customer experience.

SmartCOMM for Salesforce gives financial services institutions, the power to deliver unbeatable client experiences across the banking and wealth management lifecycle with transformative capabilities such as dynamic document generation, personalization, collaboration, and contract negotiation. Extending these enterprise-class capabilities across the Salesforce ecosystem, SmartCOMM for Salesforce is leveraged by many leading financial services institutions that need to deliver communications at tremendous scale, across multiple communications channels, all while maintaining the highest level of compliance.

SmartCOMM Integration Points:

- Financial Services Cloud
- Sales Cloud
- Service Cloud
- MuleSoft Anypoint Platform

Financial Services Lines Supported:

- Retail Banking
- Commercial Banking
- Mortgage and Lending
- Wealth and Asset Management
- Investment Banking

Use Cases Supported:

- Loan Documents, Agreements and Contracts
- Investment Proposals, Reports and Statements
- Account Servicing Correspondence

Key Benefits



Improve Customer Experience

Engage customers with tailored, professional, and personalized communications that are brand-consistent, relevant, and provide meaningful value.



Optimize Customer Engagement with Smart Templates

One Smart Template can accomplish the power of hundreds compared to other solutions. Generate documents in multiple channels, languages, legal jurisdictions, and brands all from one template.



Manage Complexity and Compliance

Integrate SmartCOMM across your Salesforce ecosystem and other enterprise platforms that require customer communication touchpoints. All communication changes are tracked and fully auditable to work in the strictest of compliance landscapes.



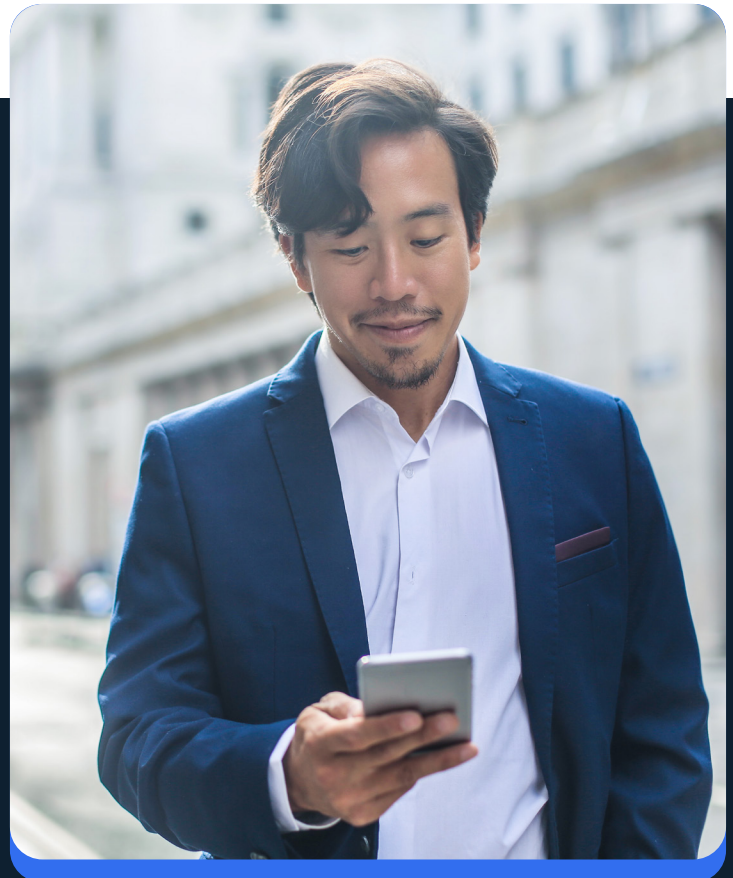
Scale to Add New Channels

Future-proof your organization by easily adding new communications channels and seamlessly orchestrating conversations across them.



“Smart Communications has the scale to provide financial institutions with the digital solutions necessary to remain competitive in a rapidly changing and competitive marketplace, as exemplified by their placement on the IDC FinTech Rankings list in 2023.”

- Marc DeCastro, Research Director,
IDC Financial Insights



Capabilities

The Power of SmartCOMM for Salesforce

Leverage SmartCOMM for Salesforce to streamline processes and empower your business units and users to take ownership and control of their communications.



Generate Professional Documents and Communications

Create graphically and data rich communications using charts, graphs, images, video or social media content while adhering to brand guidelines such as colors and fonts.



Optimize Content for Maximum Impact

Our Content Intelligence capabilities allow you to optimize the readability, tone, and sentiment within your communications, enabling you to focus on what you are striving for – truly engaging with your customers.



Grant Business-user Control

Give designers, SMEs, and front-line employees intuitive tools to update templates and content giving them ownership and control of their communications. Improve agility, personalization, and time-to-market allowing IT to manage releases and focus resources to provide strategic value elsewhere.



High Volume Batch, On-demand, and Interactive Use Cases

Meet on-demand communications and interactive scenarios while also managing your large batch customer communications use cases – all from an integrated solution.

Additional Capabilities

- Powerful Template Design**
Automate the selection and personalization of communications with intuitive, browser-based template design.
- Integrated Correspondence Editing**
Easily update documents, select pre-approved content, and finalize conversations for delivery across formats with the integrated Draft Editor.
- Responsive Design**
Create, test and troubleshoot communications on mobile devices and tablets to ensure error-free communications, optimized for the customer's specific device every time.
- Document-Driven by Data and Content**
Leverage dynamic data driven document templates to compose tailored customer communications with the click of a button within Salesforce.
- Multiple Output Channels**
Output to support print (Postscript, AFP, PDF), HTML, and digital channels (email, SMS).
- Seamless Data Access**
Rapid integration with your existing Salesforce systems data using standards-based interfaces.
- Secure Collaboration**
Securely collaborate on documents with external parties in a controlled browser-based tool with role-based access and unbreakable audit trails to achieve higher levels of compliance while reducing risk.
- Ability to Integrate E-Signature**
Automate processes by integrating with leading e-signature vendors.

Smart Communications is a Recognized Industry Leader

CELENT

Gartner

IDC

ASPIRE | LEADERBOARD

datos
INSIGHTS

FORRESTER®

SMART
COMMUNICATIONS™

salesforce



Visit the [Salesforce AppExchange](#) and search 'SmartCOMM' to experience SmartCOMM™ for Salesforce.