

How to Win in the New Normal:

Financial Services Solutions

August 18, 2020

How to Win in the New Normal with Symphony

Today's Team



Olivia Knocker
Regional Head of
Client Strategy, EMEA



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Agenda

- New Normal Follow-Up
- 2020 Insights & Trends
- Symphony Survey
- Tips on Driving Engagement
- Symphony WhatsApp Connect and WeChat Connect
- Q&A

New Normal Follow Up

Key Features:

- @mentions
- #tags
- Pinning
- Signals
- Blast
- Bookmarks
- External Directory
- Symphony Mobile
- Video, Audio, Screen Sharing
- Enterprise Integrations -
Salesforce, JIRA

Adapting to The New Normal with Symphony

Today's Team

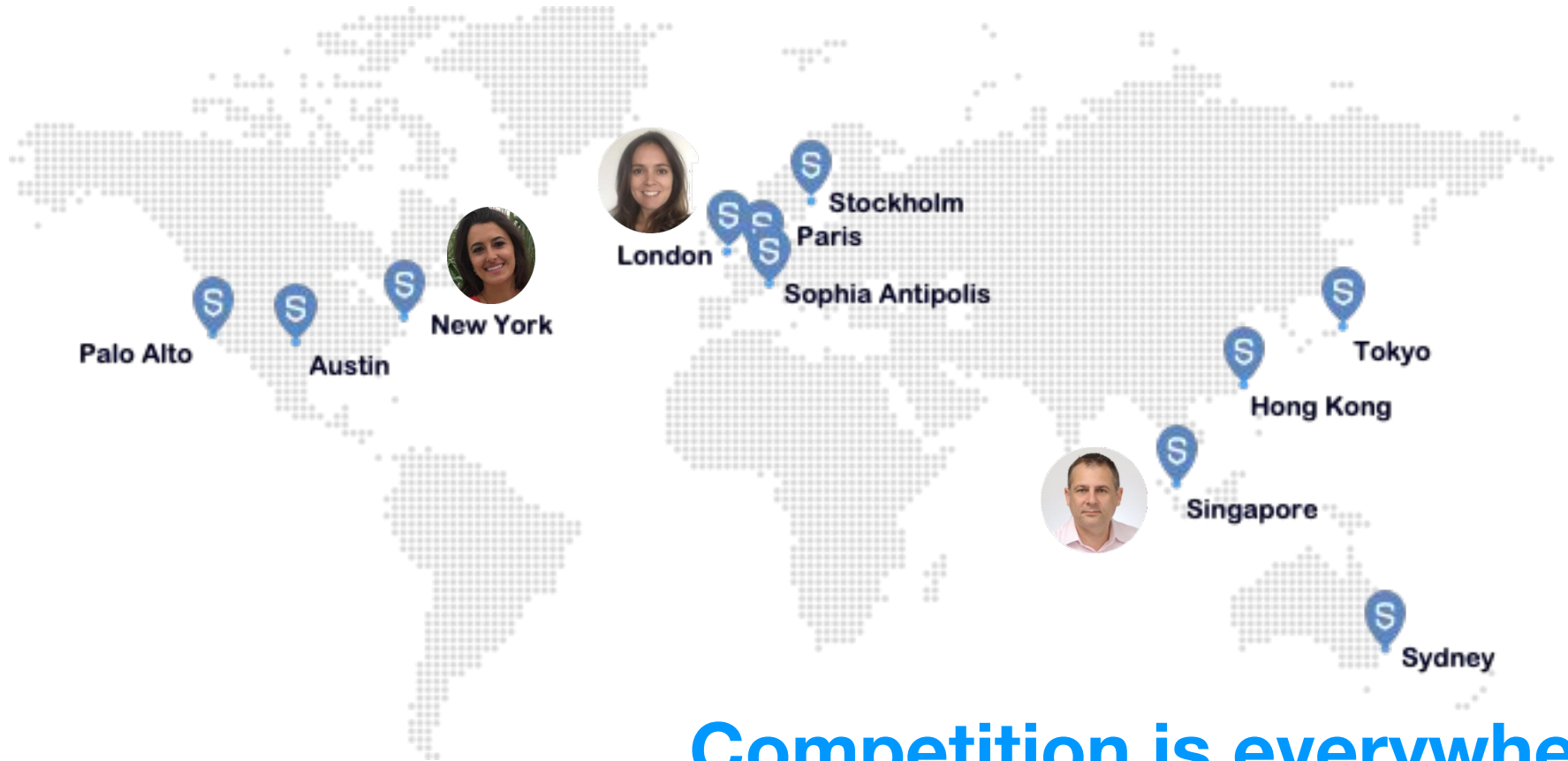


Craig Butterworth
Global Head of Global Account Management



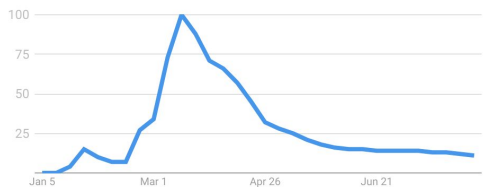
Olivia Knocker
Regional Head of Client Strategy, EMEA

Distance is not a barrier...

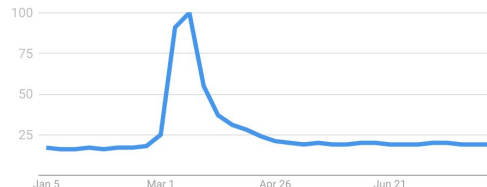


Competition is everywhere

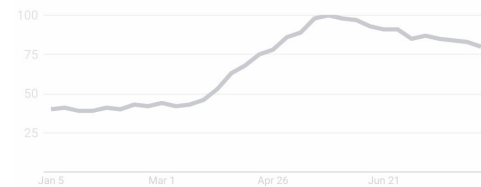
2020 Trends



Coronavirus



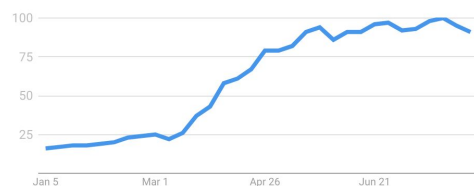
Bidets



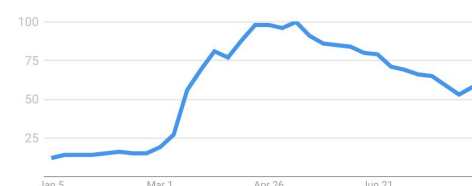
Bicycle



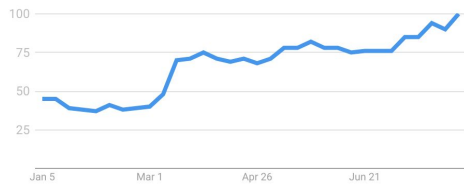
Take-out



Tie-dye



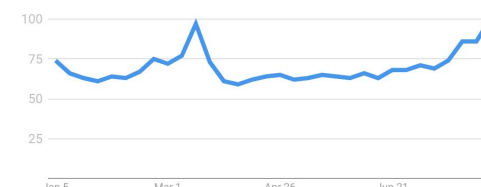
Webinar



Standing desk



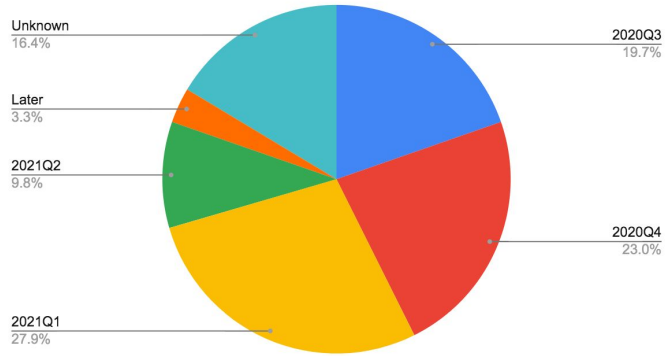
Air travel



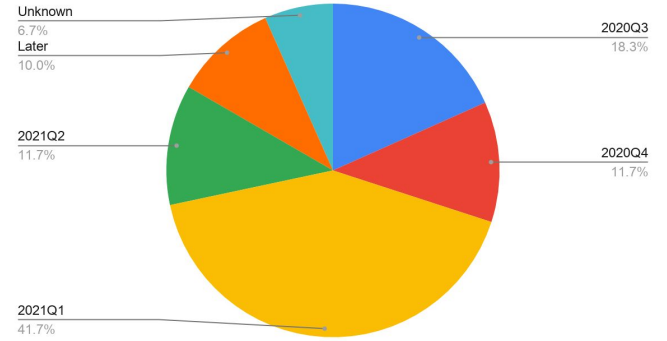
Gold

Symphony Survey Results

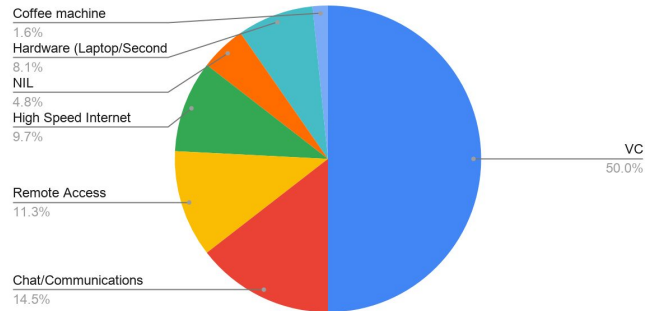
When will you next be able to meet with clients face-to-face?



When do you think you'll be back in the office?



Which piece of Technology has made the biggest difference to your daily business life during COVID19



The Need for Insight

- Changing, uncertain world
- Vision is compromised
- Strengths and weaknesses are not the same
- Your clients have the same struggles - and are adapting



Five Tips for Driving Meaningful Client Engagement in the “New Normal”

Rethink Client Engagement

satisfice [sat-is-fahys] - to choose or adopt the first satisfactory option that one comes across

- A tapestry of communication channels
- Engage with clients on their terms
- Be there for them
- ... all in a way that is secure and compliant

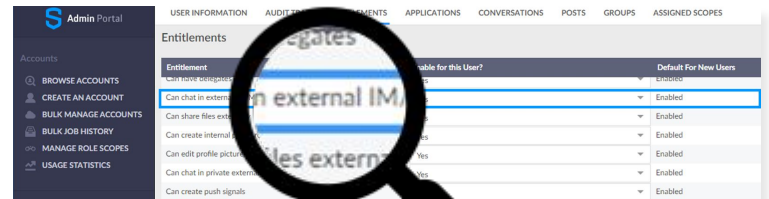
“ Generally, when we pick the right clients to support, **they remember who was there for them in challenging times** and are fair partners over the long term — and we all know it is a very long race, indeed.

-Rich Handler, CEO Jefferies, 2015

External Enablement

Leverage the world's largest financial community - be there for your clients and get externally enabled on Symphony

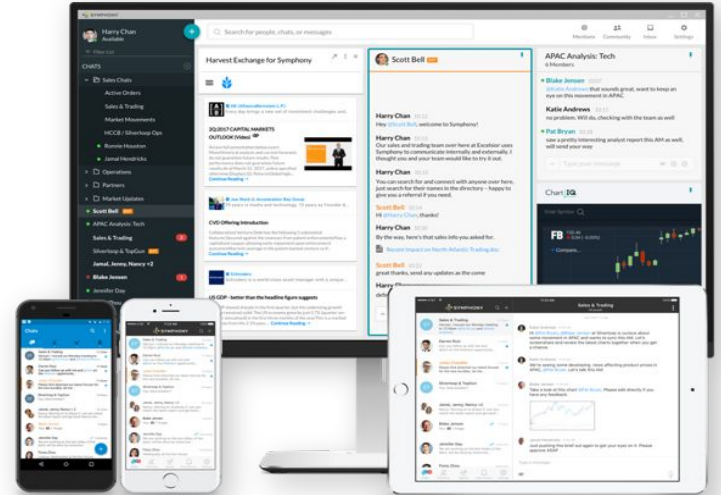
- Make sure you are part of the growing global Symphony **community**
- Leverage the Symphony **Trusted Directory**
- Today there are over **350** financial institutions on Symphony
- Increase in **+20% externally active** users in H1 2020
+525K subscribers to the Symphony community



Mobile

Stay Connected Anywhere

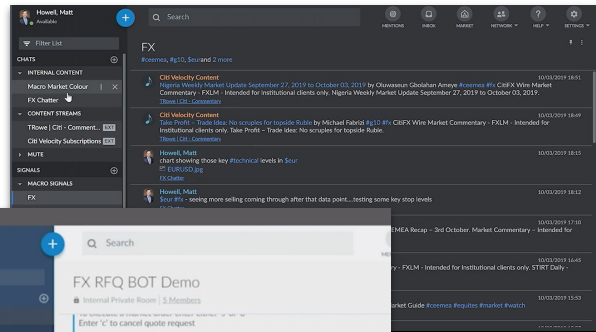
- Symphony mobile application can help you stay **connected** to clients wherever you are
- Mobile application for iPhone or Android devices
- Set custom notifications on your mobile device to filter the noise
- **+120%** mobile usage on Symphony through H1 2020



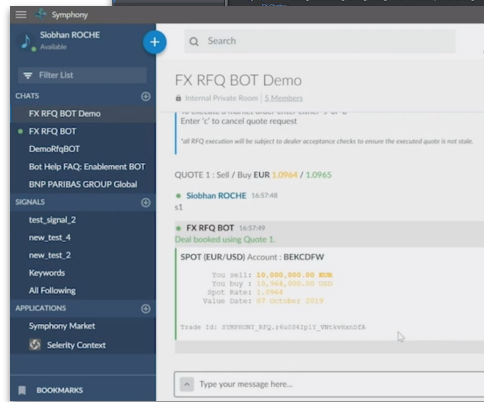
Bots

Differentiate yourself with an enhanced client offering

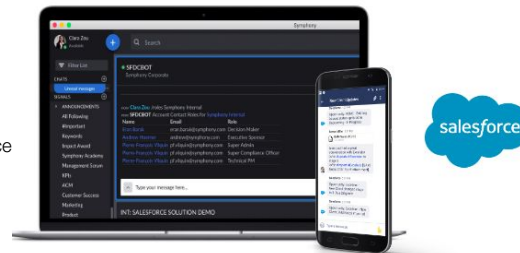
- **Improve your client service** with chatbots providing insights and pricing
- **Empower** your clients to self-serve, ensuring even your low-touch clients receive the information they need in a timely manner
- Ensure your sales teams have the client information they need at their fingertips through **integrations** with **CRM** and **KYC** platforms
- **+54%** active bots through H1 2020



Citi Velocity bot



BNP Paribas FX RFQ bot



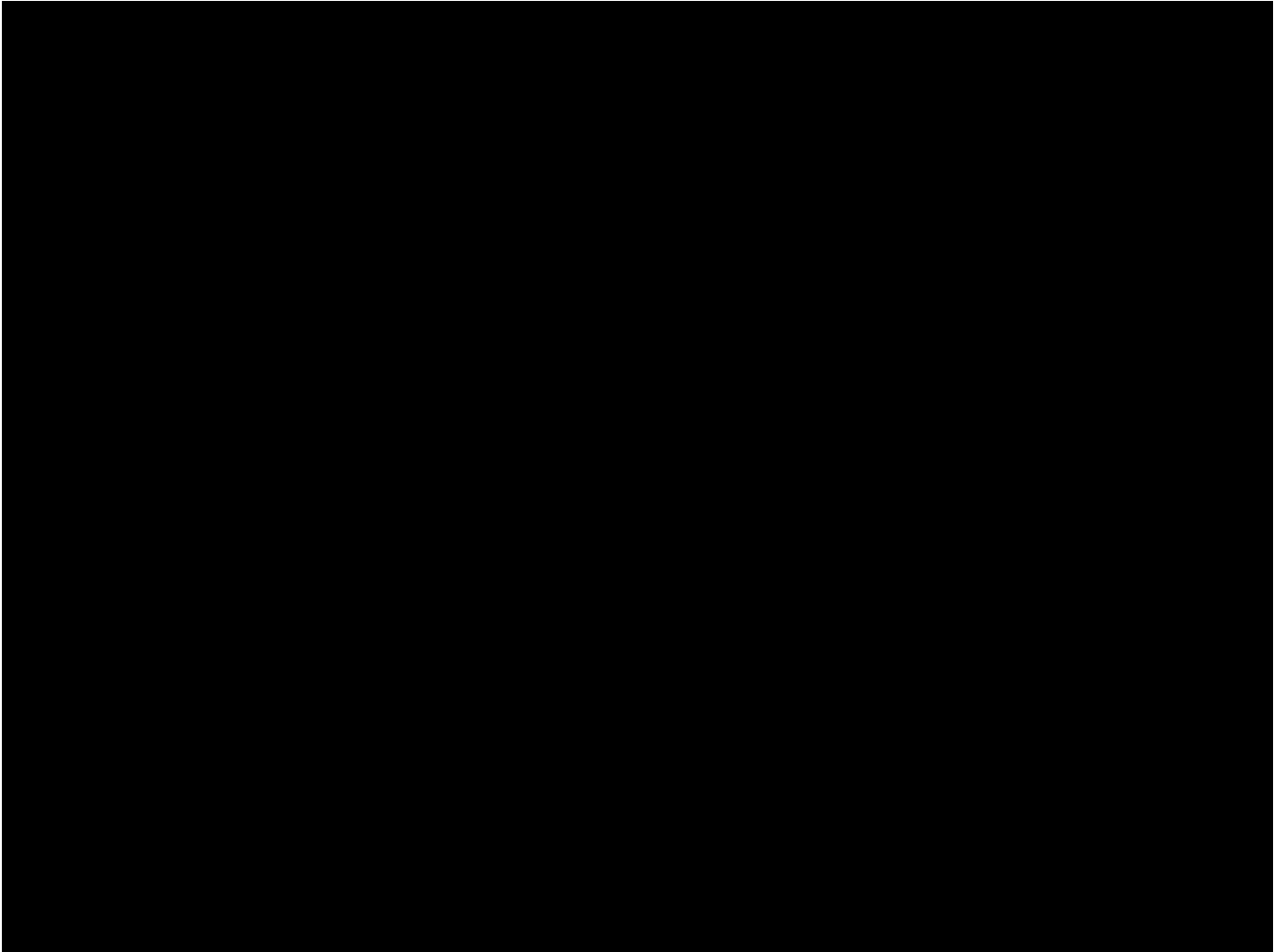
Symphony Salesforce integration

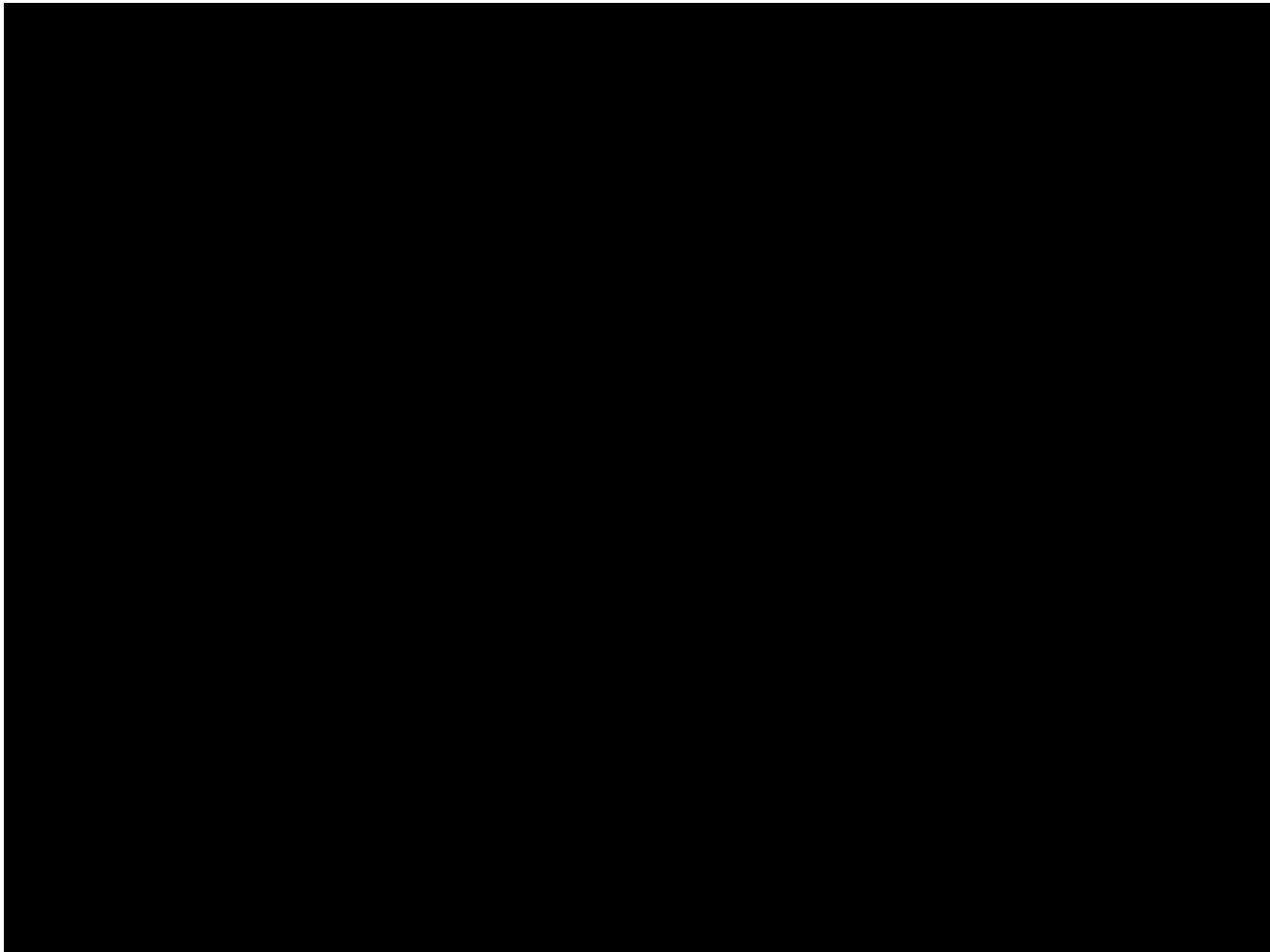
Symphony CONNECT Suite

Meet your clients where they are



- Reach your clients where they want to be whilst meeting your firm's security and compliance requirements
- Grow and build your network on Symphony
- Avoid having to constantly switch platforms between clients
- Extend bots to your clients across the Connect Suite*





Key Takeaways:

1. **The New Normal is constant change, uncertainty and obfuscation**
 - a. INSIGHT from clients is essential to be competitive
2. **Rethink your client engagement strategy**
 - a. Tapestry of channels;
 - b. Engage clients on their terms
 - c. Be there for them
3. **Symphony can help by:**
 - a. Connecting you to the world's largest financial services network
 - Get externally enabled
 - b. Be there for your clients when they need you
 - Get going with Symphony Mobile
 - c. Provide a differentiated client experience
 - Empower your clients, sales and RMs with bots
 - d. Connect with your clients where they are
 - WeChat Connect / WhatsApp Connect

The logo for Symphony Innovate 2020 is displayed in white text on a dark grey rectangular background. The words "SYMPHONY" and "INNOVATE" are stacked vertically on the left, and the year "2020" is prominently featured on the right in a larger font size.

See more of Symphony's capabilities in action at Symphony's all digital **Innovate event – Oct 8** [register here](#)

Q&A

Follow-up questions?

NewNormal@symphony.com