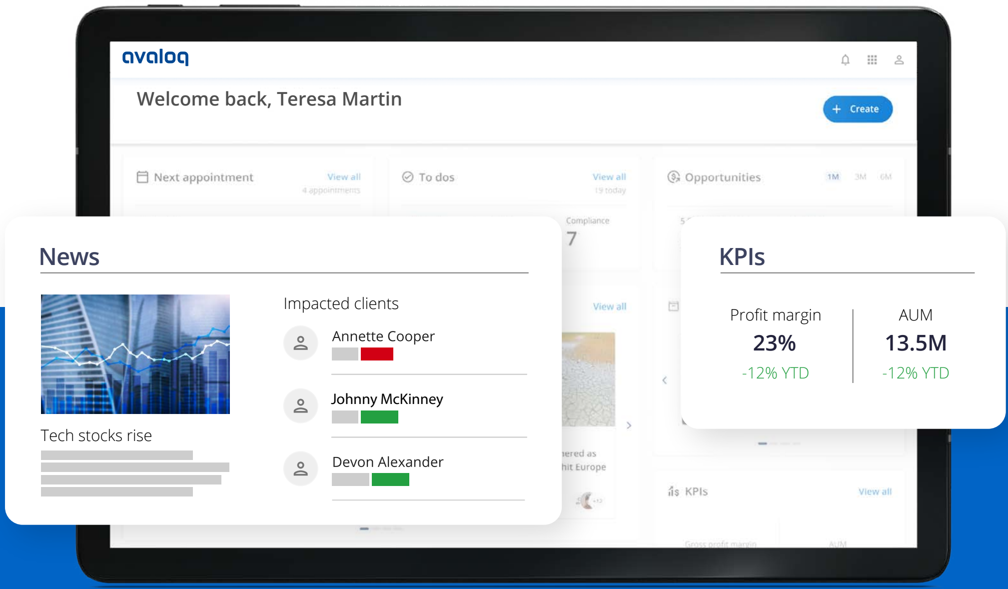
Client Service

AVALOQ WEALTH



Equip your front office with a product specifically designed for wealth client management

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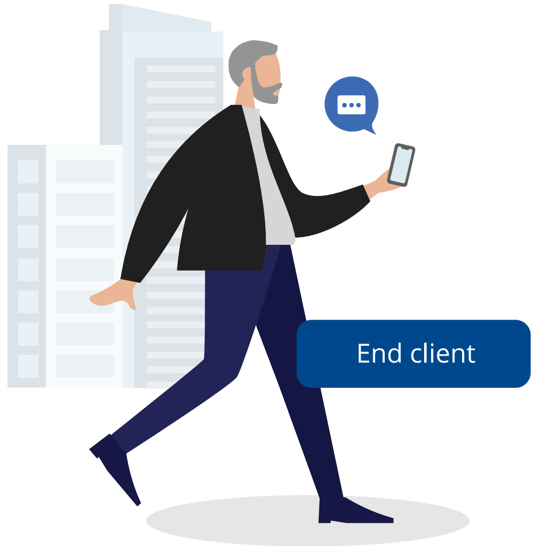
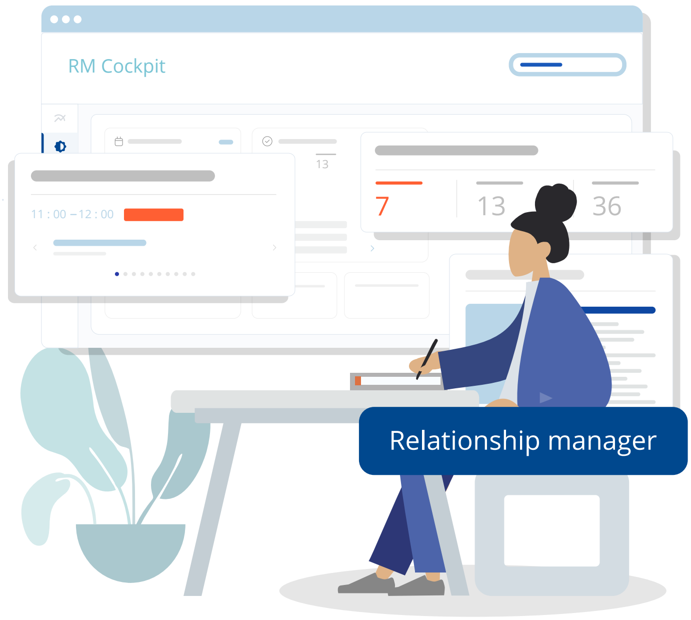
Relationship managers would like to be more efficient throughout the client lifecycle



Client onboarding

41% of affluent to UHNW investors believe opening a new account or portfolio with a bank or wealth manager takes too long.

Source: Avaloq



Operational efficiency

78% of relationship managers want a digital cockpit that brings together all the underlying capabilities in a one-stop platform.

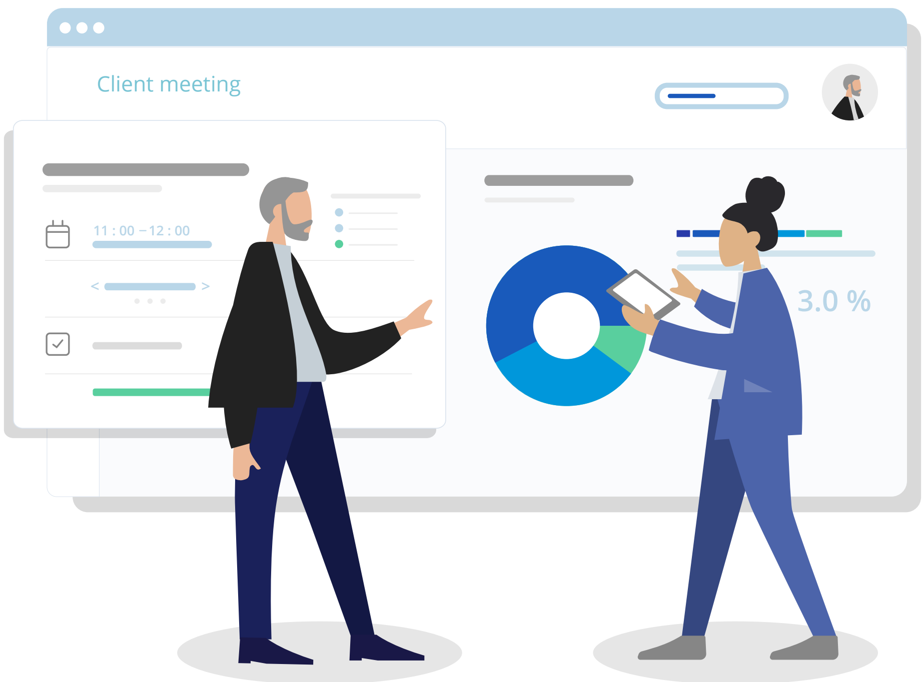
Source: Accenture

Wealth managers need to ensure they are ready to meet client expectations of more balanced, tailored and all-encompassing services.

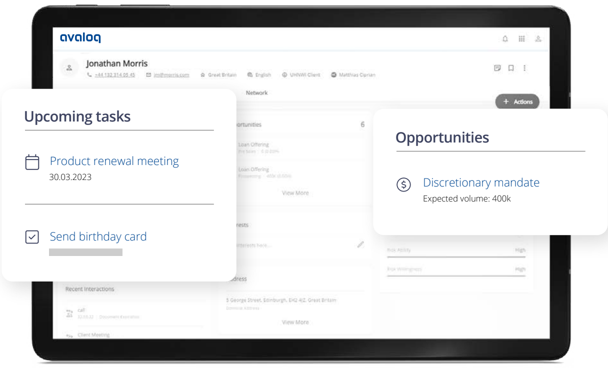
Source: EY

Manage the entire lifecycle from prospecting to relationship management

Transform your front office with a product that optimizes the entire client journey. Identify new sales opportunities and manage prospects with advanced market and client analysis. Onboard clients seamlessly – the Client Service product accelerates the process from days to hours through automation of manual tasks and compliance checks. Your front office staff can access all their daily tasks, relationships, prospects and news from one centralized interface, guiding them through the myriad tasks and increasing their operational efficiency. The tasks and news feeds are customized to each portfolio and each manager, allowing each team member to focus only on what matters to them and their clients. Every key step of every client's journey can be managed via our powerful client lifecycle management engine, from onboarding to offboarding.



Product highlights

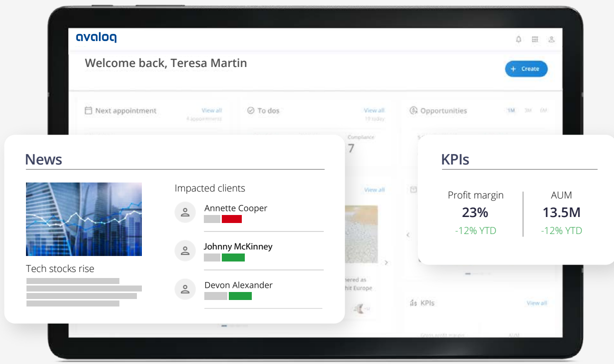


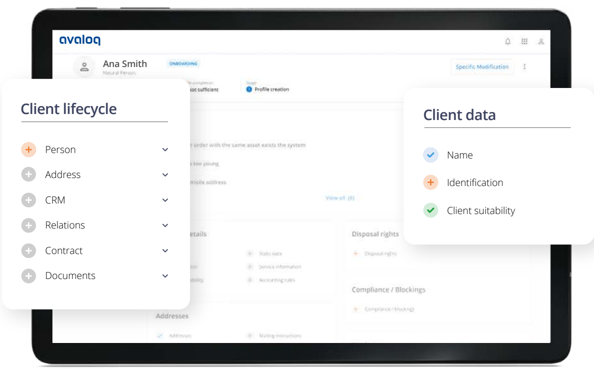
Client book and client view

- Pre-configured views providing the most important content about the whole client book
- Single client overviews with prioritized to-dos, appointments, wealth overview
- Upcoming and recent activities, bank products and contracts, investments and performance
- Networks feature, showing other clients and prospects in the client's network, supporting prospecting

Relationship manager dashboard

- AI-powered new feature, showing only the news that is relevant to specific clients and client books
- KPI tracking, including net new assets, client activities and client feedback, for client book or individual clients
- Business opportunities such as prospects to follow up on, client onboarding tasks and portfolio investments
- Personalized investment ideas or sales opportunities based on a self-learning algorithm or CIO content





Client lifecycle management

- Comprehensive management of static client data, product data and CRM data
- Efficient data entry and modification in responsive forms, duplicate checks, real-time data validation
- Process engine, powering semi-structured, complex but flexible process flows
- Seamless integration of third-party systems, allowing re-use of existing interfaces

Benefits of Client Service

Increase front office productivity by up to 25%

Across the industry, front office staff are not spending as much time as they would like to on client-facing and revenue-generating tasks. A recent survey in the APAC region suggests that 78% of relationship managers (RMs) consider an all-in-one cockpit to be an important solution to this challenge (Accenture). The same research also suggests that wealth management firms could expect an uplift in revenue of 10-20% and a productivity boost for RMs, assistant RMs and investment advisers of between 5 and 25% as a result of deploying an RM cockpit.

360° view of clients

The Client Service product provides a holistic view of all your clients, opportunities and prospects. Throughout the lifecycle from prospecting to onboarding, relationship management and even offboarding, relationship managers can access every piece of relevant information about each of their clients from one starting point. Integrate seamlessly with Avaloq Core or with your own core banking systems to enable real-time data validations for data input and to generate notifications or to-dos at key stages in the client lifecycle.

Intuitive and easy to learn

Select a powerful, user-friendly product for your relationship managers. Remove the need to compromise on user experience or functionality with a product that gives your front office the best of both worlds. Avaloq has leveraged over 200 wealth management experts with years of experience to design and test our software. The user interface follows the latest and most recognizable design patterns from Google Material Design, making the Client Service product easy to learn and reducing the need for training.

Technology principles

Core-agnostic

The Client Service product operates on any core banking system or out of the box with Avaloq Core Banking. Our product is part of the Avaloq Wealth product line, which uses a clear, unified data model and interfaces that are designed for communication with any core banking system.

Modular

The Client Service product functions on its own but is especially powerful when used alongside other Avaloq Wealth products. All Avaloq Wealth products can be deployed independently as standalone products or as a whole product line covering the entire wealth value chain.

Flexible

Deploy Avaloq products as SaaS in public cloud (AWS) or in our own Avaloq cloud, or purchase a licence and manage our products yourself, on-premises or in the cloud. Select the deployment set-up that works best for your business and the regulatory environment you operate in.

Scalable

Avaloq Wealth products come with a high degree of horizontal scalability as standard. Capacity can be easily adjusted from day one to meet increasing demand from our clients, supported by industry standard containerization technology from OpenShift and Kubernetes.

Open

The Client Service product supports the integration of third-party services and uses open-source components where possible. The integration layer, composed of APIs and SPIs, allows you to seamlessly share data between the Client Service product and third-party products and services.

Iterative

Updates to the Client Service product are released every two months. These short release cycles enable Avaloq to be more flexible with client needs and important third-party components, while clients can react faster to market developments and reduce time to market for new features.

Automate your offering with Avaloq Wealth products

Client Service

Investment Advisory

Discretionary
Portfolio Management

Avaloq Wealth enables banks and financial institutions to manage the full client journey from prospect to a trusted relationship. Avaloq is the only provider that covers the full scope of client and investment management in one integrated solution. Our 35+ years of experience in financial services and our focus on software and services for wealth management places us in a unique position to serve our clients with innovative products and services from front to back office.

"Avaloq Wealth is a premier product in the marketplace servicing the front-middle office. It is a wide-ranging and robust offering that enables a scalable delivery of investment advice. One of the core differentiators of Avaloq's investment and relationship management solution is complete coverage of the holistic investment process, enabling a 360-degree client view on a single platform. This view is combined with data analytics and client–adviser engagement tools which offer a fully integrated and seamless user experience."

Ashley Longabaugh
Senior analyst, Celent

Book a demo

If you would like to find out more visit avaloq.com/contact-us.

About Avaloq

Avaloq is a global leader in digital banking solutions. Its core banking platform and wealth management technology are delivered through Software as a Service (SaaS) and on-premises models. Avaloq's Business Process as a Service (BPaaS) offers a high degree of automation to boost back-office efficiency. More than 150 banks and wealth managers worldwide trust Avaloq for its innovative products and reliable services.

150+

clients in 35 countries

CHF 4tr

client assets managed

17 offices

in 10 countries

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