

Earn and keep consumer trust in financial services

In an industry that prides itself on steadfast reliability, change and agility have become the new order of operations. Every day consumers are expecting more from financial services across all available touchpoints—and with customer lifetime value at stake, you must evolve to align with expectations.

By 2030, banking will be invisible, connected, insights-driven, and purposeful

—FORRESTER | The Future of Banking Is Built On Trust

TOP CHALLENGES FOR FINANCIAL SERVICES

▶ Diminished consumer trust

If you haven't made trust a central + well communicated tenet of your organizational strategy, consumers will find somewhere else to invest.

▶ Competition for share of wallet

With the average consumer sharing only 25% of their wallet with a single institution, there's a huge opportunity for growth. Are you positioned to capitalize?

▶ Limited visibility into drivers of attrition

Churn rates for new financial services customers are sky high: 20–25% leave during the first year. Do you have a handle on why they're leaving and where they're going?

▶ Data overload + no knowledge on how to use it

Databases have never been more full, which means personalized experiences should be the norm. Yet it's not happening, and companies don't know how to move forward.

Have you done all you can to address these challenges in the last year? **If not, you're falling behind your peers.**

HOW TO MOVE THE NEEDLE

Industry leaders are making headway through better use of their customer + employee feedback. With these data streams headlining each decision, you're equipped to address:

- ▶ New customer acquisition
- ▶ Retention + loyalty of current customer base
- ▶ Curbing attrition/loss of wallet share
- ▶ Operational efficiencies across channels



SOLUTION PORTFOLIO

Enterprise experience management

Customer + Employee + Brand



smg360®

PLATFORM			SERVICES	
LISTEN <ul style="list-style-type: none">LocationDigitalContact centerRatings + reviewsBehavioralThird-party integrations	INTERPRET <ul style="list-style-type: none">Role-based dashboardsAI-powered text analyticsReal-time alertsBenchmarkingBusiness intelligence (BI)	ACT <ul style="list-style-type: none">Key driversPredictive analyticsCase managementProgram healthCustom reporting	<ul style="list-style-type: none">Action-planningJourney analyticsProduct performanceChurn + attrition analysesLaunch + training	MAXIMIZE <ul style="list-style-type: none">Deep-dive insightsFinancial linkage + ROICompetitive intelligencePartnership reviews + optimizationStrategic planning

HOW SMG IS DIFFERENT

No other XM vendor combines platform technology and professional services to achieve meaningful business outcomes like SMG.

Our unique software with a service (SaaS) model means our teams provide analysis support, insight delivery, and strategic partnership—putting you on a **faster path to improvement.**

INDUSTRIES SERVED

Finance, services, retail, restaurant, and healthcare brands in 150 countries for over 30 years

INDUSTRY RECOGNITION

- LEADER** | The Forrester Wave™: Customer Feedback Management Platforms, Q2, 2021
- VERTICAL SPECIALIST LEADER** | Omdia Market Radar: AI-enabled Experience Management Platforms
- LEADER** | G2 Grid Report for Experience Management, Summer 2021
- VISIONARY** | Gartner Magic Quadrant for Voice of the Customer

“ SMG is a good fit for organizations seeking a software and services partner that has deep expertise in delivering highly relevant and actionable insights. ”

THE FORRESTER WAVE: CUSTOMER FEEDBACK MANAGEMENT PLATFORMS, Q2 2021

If you want to know more about how SMG can put you on a faster path to performance improvement, contact us or **request a demo at smg.com.**



About Service Management Group

SMG inspires experiences that improve people's lives. We are a catalyst for change—helping organizations generate new revenue, grow existing revenue, reduce churn and detractors, and drive operational efficiencies. Our unique software with a service (SaaS) model puts a dual focus on platform technology and professional services, making it easy for brands to activate insights based on customer, patient, and employee feedback. To learn more about our customer, employee, and brand experience management (XM) solutions, visit www.smg.com.