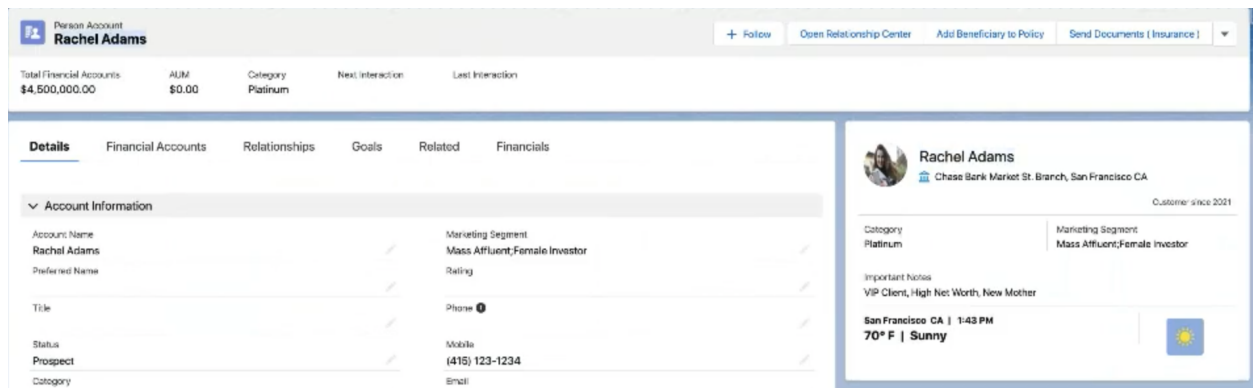




Client Flex Card



Overview

The Client FlexCard surfaces key client information in one place so a service agent has relevant context when interacting with the client.

Client card components are built using FlexCards and are configurable using OmniStudio.

Use Case Scenario

Service agents and relationship managers interact with clients across the call center and in physical branches.

Providing service agents and relationship managers with important client information like the client's name and image, primary branch, interest tags, and local weather all in one place helps make their interactions with clients more personalized and efficient.

Business Objective

Improve level of service and personalization provided by service agents and relationship managers by surfacing key pieces of information pertinent to the client.



Datapack includes:

FlexCards

- FSCProfileCard

Integration Procedures

- Industries-FSC_ProfileCard