

Solutions for Financial Services

INDUSTRIES



In Financial Services – The Devil is in the Details

Tech + Human Touch Business Services Support for the Financial Services Industry

Today's financial services industry requires outsourced business service partners that are highly responsive, provide best practice data security, and comply with all regulatory guidelines. Banks, credit card companies, and working capital lenders set a high bar for outsourced business service providers and expect an unwavering focus on detail and precision.

For almost 20 years Solix has delivered business services that help ensure customer satisfaction while helping to progressive organizations accelerate large scale program deployment. From data security to compassionate outsourced contact center support, Solix focuses on the details that are critical to the delivery of a broad range of financial products and services.

We've taken the time to understand the specific needs of the industry. Our diligence and focus is why we are a leading provider of Business Process Outsourced (BPO) services to a broad range of governmental and commercial organizations that require precise program execution and white glove customer care.

Solix works hard to support the operational and business challenges of financial institutions as they work tirelessly to support business and consumer groups that rely on them. We understand the delicate balance that must be maintained between customer satisfaction and the need to manage costs and program efficiency.

We Understand the Specialized Needs of Financial Institutions

For decades we've worked with a broad range of companies to help them with complex program deployment, management and reporting. Solix provides financial organizations with a broad range of support including:

- ✔ **Program Design** – Collaborative support developing and deploying detail intensive programs
- ✔ **Case Management** – Precise eligibility and application processing and determination services
- ✔ **Customer Care** – Omni-channel equipped contact centers allowing tier 1 engagement over multiple platforms
- ✔ **Technology** – Highly customizable technology platform enabling integrated support programming
- ✔ **Data Security** – Highly redundant security protocols to satisfy the most demanding industry standards
- ✔ **Growth Programming** – Business intelligence tools and outbound customer acquisition assistance capabilities

Industry Insights and Experience

Our broad multi-industry experience has afforded us opportunities to help leading organizations improve program efficiencies and customer impact. We understand the importance of compliance monitoring and data security essential in the financial services industry.

We appreciate the financial services industry's need for precise program management, efficiency, and compliance with state, local, and federal regulations. Solix delivers measurable BPO impact through our:

- 800+ US based associates
- Multiple US based Contact Centers
- 300+ Contact Center Agents
- Bi-lingual customer care program support
- 2 million customer calls managed/year with 99% measured accuracy
- 97% documented customer satisfaction scores
- 20 million plus applications reviewed with eligibility determinations in less than 5 minutes

The Solix Difference

The speed of change in financial services demands business service providers that provide an end-to-end scope of support. Solix assists financial services organizations with a range of mission critical capabilities including:

- ✓ **Holistic Capabilities** – Complete program design, deployment and detailed performance reporting
- ✓ **Regulatory Expertise** – Procedures and protocols to ensure regulatory compliance management
- ✓ **Financial Management** – Extensive billing and collections expertise
- ✓ **Program Oversight** – Ongoing program monitoring and real time reporting
- ✓ **Customer Support** – Multiple US based contact centers providing inbound + outbound support

Focused on Financial Services Industry Needs

We specialize in helping financial institutions manage complex programs by providing a range of critical outsourced business services:



TIER 1 APPLICATION MANAGEMENT
Tier 1 eligibility determination and process management



TARGETED PROSPECTING
End-to-end targeted upsell + cross sell program management



CUSTOMER CARE
Omni-channel contact center support for customer inquiry management



CUSTOMER RESEARCH
Targeted outbound surveys to support onboarding or post enrollment protocols



ABLE PROGRAMS
Tax-advantaged savings accounts for individuals with disabilities



AUDITING + CERTIFICATIONS
Regulatory required audits + screening program administration

Let Us Deliver for You

Let Solix show you how we can help you implement complex, customer focused support programs while delivering improved financial metrics for your organization. When efficiency, attention to detail, and customer satisfaction are key...count on Solix.



FOR MORE INFORMATION ON OUR FINANCIAL SERVICES INDUSTRY SUPPORT:

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