



How can we keep customer conversations open, interesting and relevant?

Secure Messenger – the primary driver for customer advice and satisfaction

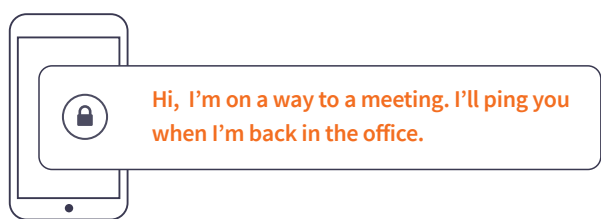
## Customer

The customer opens their mobile banking app which gives them access to Secure Messenger.

The customer sends their RM a message:



The customer receives a message notification, but can't speak with the RM at the moment....



## Relationship Manager (RM)



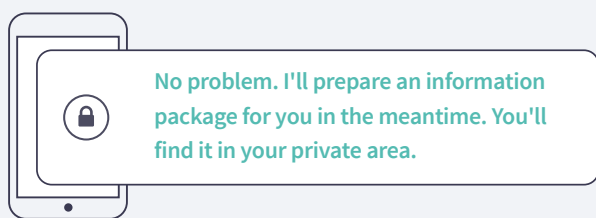
The RM receives a notification from My Client's App which manages all customer interactions.

The RM has a new recommendation for their customer and replies:



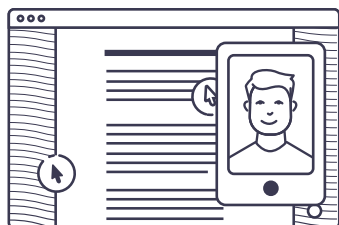
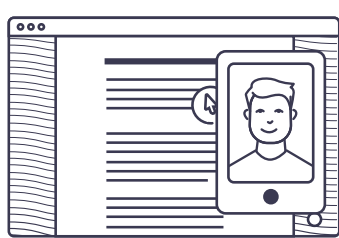
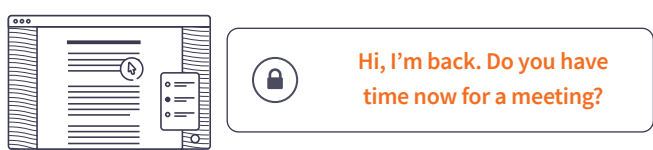
This is possible by using the Mobile SDK provided by unblu.

The RM prepares all the information for the meeting.



Four hours later...the customer is ready for an online meeting

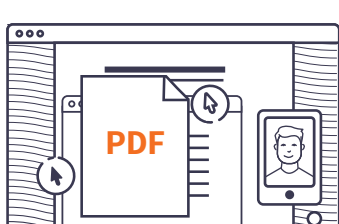
The customer is available, but is now using their laptop.



The customer **accepts the co-browsing session** with their RM.



A virtual browser is now visible to the customer. The agent can open a particular website while the customer follows.



Later, the customer is on the train on their way home, and accesses the mobile app to analyse the information provided by their RM.



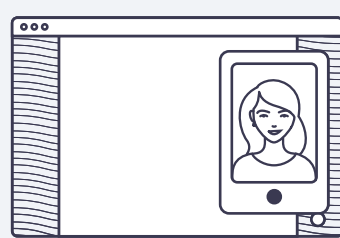
### Video Call

The RM receives a notification on their desktop indicating the customer is available.

The RM suggests a video conference to provide more personal advice.

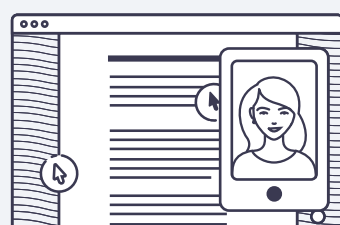


Video-Calling...



### Embedded Co-browsing

The RM **requests a co-browsing session** to guide the customer through the information package in their portfolio.



### Universal Co-browsing

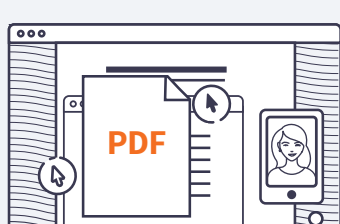
The discussion now involves external websites as part of the discussion.

**With one click, the agent begins Universal co-browsing and proceeds to the specific page.**



### Document Co-browsing

The RM has prepared a document for the discussion and uploads it to the conversation window, sharing the document with the customer.



The customer is not 100% sure about making the investment.

**Before the call ends, the RM leaves a message with all the information (see below). The customer can review the information at their convenience and then make a final decision.**



The call ends

With the **unblu suite**, banks have complete control over data flow, data storage and every aspect of their security

Communicate with your customers in a 100% secure environment. Record every interaction and access them when you or your customers need it (comply with GDPR, Mifid 2)

Notify and inform your customers of their portfolio updates and contract details while keeping your costs under control (comply with Mifid 2 and your national regulator)

### Secure Archiving

