Advisory
How Secure Messenger can help you keep your customer conversations open, interesting and relevant.

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.

The customer is available, but is now using their laptop.
The RM receives a notification on their desktop indicating the customer is available. The RM suggests a video conference to provide more personal advice.

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

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

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

With the Unblu suite, you have complete control over data flow, data storage and every aspect of the 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)

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:

The RM prepares for the meeting.

Hi, I’m back. Do you have time now for a meeting?

Video-Calling...

Embedded Co-browsing
The RM requests a co-browsing session to guide the customer through the information provided by the RM.

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

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 meeting 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.

I think you’re right. This is a great opportunity for me. Let’s go for it.

Great. I’ll get that moving ASAP.

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