



zoom for Financial Services

Elevate Client Services and
Employee Experience **with**
Secure, Frictionless Unified
Communications

Today's financial services landscape is defined by the relentless drive to retain customers and minimize churn while increasing revenue. Institutions are racing to keep pace with an onslaught of transformational forces created by shifts in customer and employee needs as well as ever-evolving market trends.

An industry undergoing evolution

Customers are looking toward financial services institutions to offer new, innovative ways to connect, while employees expect a flexible working model to be the norm moving forward — demanding a new type of agility from institutions. This is only compounded by the traditional demands of shareholders, as these institutions must also navigate updated organizational structures, mergers, acquisitions, and more during this period of rapid change.

These evolving market forces require institutions to deliver innovative services that can scale easily, accommodate hybrid

work, and leverage their existing investments — all while meeting security, privacy, and compliance requirements.

While these forces could be seen by many as headwinds, leading institutions will strategically deploy the right technology that turns this change into a competitive advantage.

This is why [8 of the 10 largest U.S. banks and over half of the world's largest banks](#) have chosen Zoom as their vendor of choice.

Technology designed for relationship-building

As financial services institutions work to serve digital-first customers and empower a flexible, hybrid employee experience, they are partnering with Zoom to deliver the same trust through virtual interactions as in-person communication, driving efficiencies and allowing for relationship-building that defies the physical limits of distance and location.

[Zoom's unified communications platform](#) — which includes [meetings](#), [chat](#), [phone](#), [conference room and workspace](#), [webinars](#), [events](#), and [contact center](#) solutions — provides the flexibility, security, and interoperability that today's

financial institutions require to address modern client needs and establish stand-out services.

With [Zoom](#), financial services institutions can build closer customer and employee connections and future-proof their business, all with the security and privacy controls in place that they need to remain compliant while they collaborate with confidence. Some of these controls and features include [archiving](#), [information barriers](#), data leakage prevention, and more.

“With Zoom, we're creating a workplace built for the future.”

Rob Alexander, CIO
Capital One

[Read the customer story](#)



Why Zoom for financial services

Here are some of the ways Zoom's unified communications platform can help future-proof your financial services institution:



Supportive: Connect digitally and build closer connections with your customers by providing dynamic, omnichannel services. Increase customer satisfaction with video-first 1:1 client consultation or real-time collaboration sessions via the Zoom Whiteboard. For in-person or hybrid interactions, you can greet clients with [Zoom Room's Virtual Receptionist Kiosk](#) or present visually-engaging information via Zoom Rooms signage.



Flexible: Give your team the ability to embrace flexible work, with features like [Zoom Rooms Smart Gallery](#) designed to create an inclusive experience that promotes equality for both in-person and remote workers through the strategic application of AI technology. And when workers are on the road, they can take advantage of [Zoom Phone's](#) interoperability to elevate a phone call to meeting, or make reliable client calls from remote locations.



Secure: Client trust — and therefore business viability — is contingent on security, so any financial services institution using Zoom should take advantage of important security and privacy features like [data routing control](#), [end-to-end encryption](#), and [meeting and webinar archiving](#). Zoom subjects our services to security safeguards designed to protect the confidentiality and security of customer information. These safeguards can help our customers meet their Gramm-Leach Bliley Act, NY DFS, GDPR, and other security compliance requirements.



Interoperable: Zoom integrates with CRM providers to provide a holistic view of your customers, archiving vendors to support archiving regulatory requirements, electronic document signing partners to accelerate agreements, and more.



Accessible: Services like [auto-generated captions](#) and real-time transcription help enable a more equitable communications experience, support faster client follow-up, and expand and diversify your potential portfolio of clients.



Scalable: Scale video, chat, and phone easily and reliably across your institution to support communication and transparency during change management efforts like mergers and acquisitions. Zoom's easy implementation process fosters location-agnostic connection-building as new organizations — or new hires — join your institution. Zoom solutions also help make scale sustainable by providing easy-to-use controls, strategic features, and clear policies designed to enable compliance and secure important client information.

Use Cases

Empower your employees to do their best work with tools that support collaboration, ideation, and equity.

Use Case	Example
Safe and welcoming experiences at office and retail locales	Provide a contactless entry experience for your building guests with Zoom Rooms Virtual Receptionist Kiosk
Identify and reserve flexible workspaces	Leverage Workspace Reservation to allow employees to easily book workspaces using an interactive map
Inclusive meeting experiences	Capabilities like Smart Gallery, auto-generated captions, in-meeting chat, and more enable flexible, engaging, and accessible meetings
Annual regulatory training and product training	Elevate annual training by leveraging Zoom Webinar or Zoom Events – solutions optimized for larger group sessions. You can also provide on-demand recordings after the fact for anyone who missed original sessions

Improve client services by providing innovative, omnichannel experiences.

Use Case	Example
Manage customer outreach via distributed teams	Zoom Phone enables reliable and flexible client communications, with organizations able to customize business hours, greeting prompts, routing rules, and the voice response menu to their institutions' needs. You can also centrally manage policies for call recording and retention and intelligently monitor business interactions through analytics
Inbound customer consultation services	Provide enhanced client support from start to finish. Use Zoom to support a client over real-time video, instant chat messaging, voice calls, and more as they fill, sign, and submit forms or application
On-site insurance claim handling	Pair Zoom's video SDK integration with relevant hardware, such as video drone technology and eSign providers, to expand service offerings. This can help capture critical on-site imagery for evaluating and processing claims, or just aid clients in completing and submitting claims

Increase shareholder value through ongoing community and facility development.

Use Case	Example
Customizable investor and employee events	Zoom's flexible, large-scale events platform provides investor communities with a virtual venue for communicating, networking, and collaborating. Combine Zoom Events with Zoom Rooms capabilities to bring hybrid audiences together in a dynamic way
Design the bank of the future	Whether you are using Zoom Rooms digital signage for virtual appointment scheduling and check-in, providing real-time updates via Zoom Chat, or supporting employee connectivity with Zoom Phone, Zoom is your platform for future-proofing your bank



Zoom Video Communications, Inc. (NASDAQ: ZM) brings teams together to get more done in a frictionless video environment. Our easy, reliable, and innovative video-first unified communications platform provides video meetings, voice, webinars, and chat across desktops, phones, mobile devices, and conference room systems. Zoom helps enterprises create elevated experiences with leading business app integrations and developer tools to create customized workflows. Founded in 2011, Zoom is headquartered in San Jose, California, with offices around the world. Visit zoom.com and follow [@zoom_us](https://twitter.com/zoom_us).