

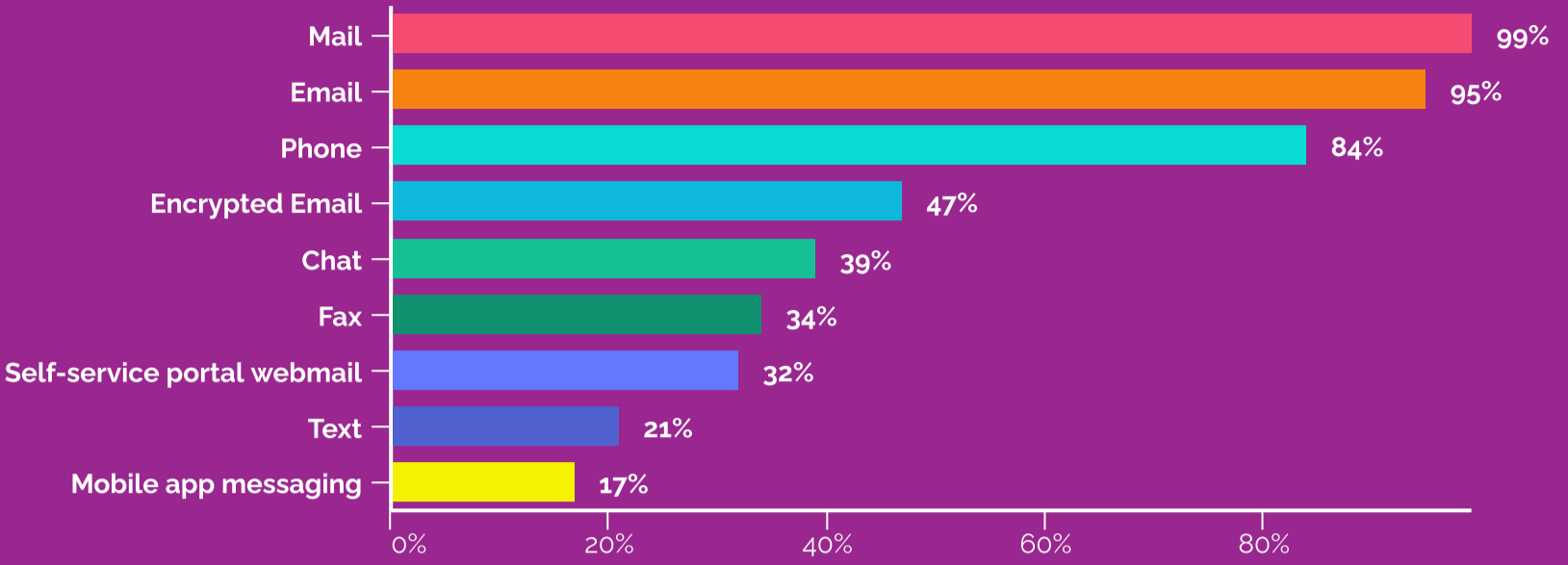


Compliance Issues Plague Customer Engagement

Customer Engagement Trends in Financial Services and Insurance

Along with Gatepoint Research, we surveyed IT and Financial executives on their thoughts on how compliance issues are impeding their customer experience

How do your customers communicate with you?



cannot exchange confidential forms and documents with their customers

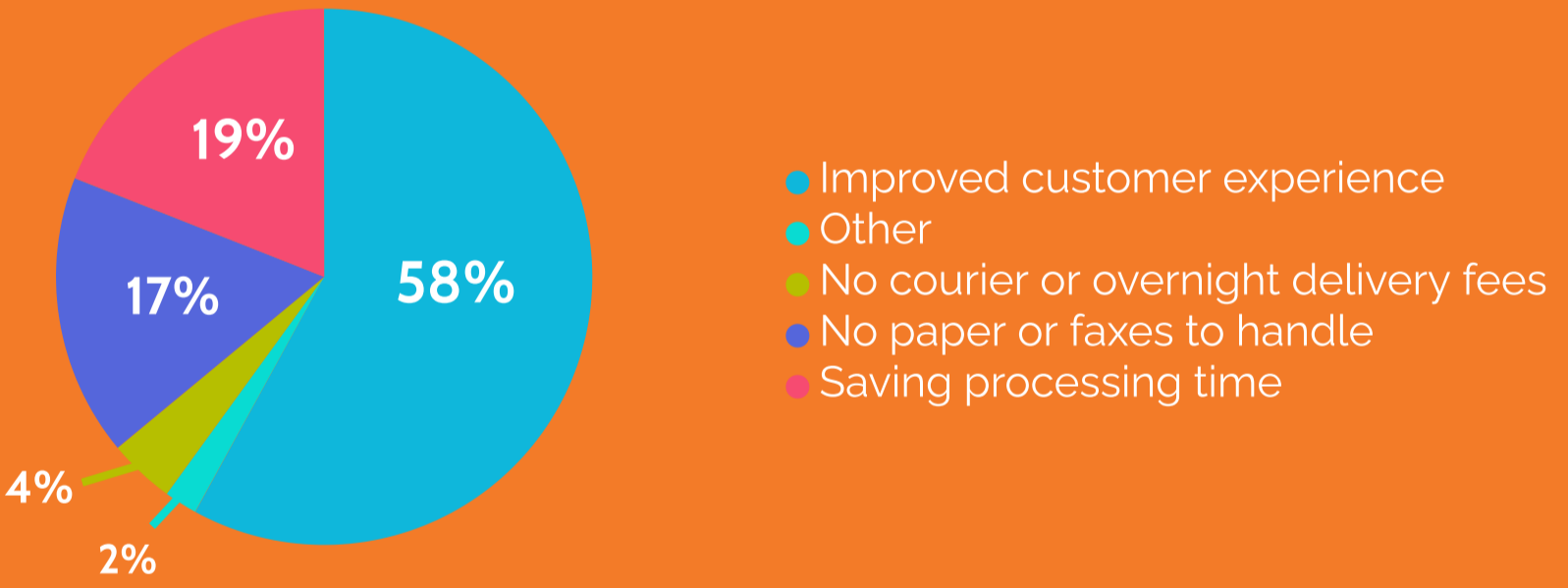
68%
of respondents

say that their customer self-service portal is "sort of integrated" with their customer service communication channel

Do your customers have any of these complaints about interactions with your company?

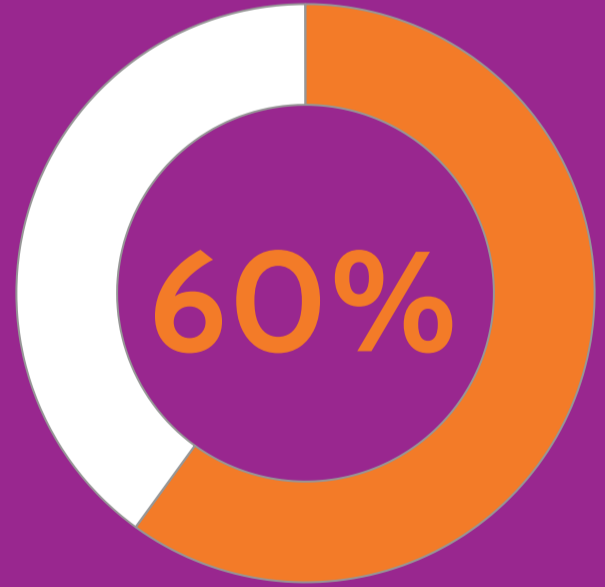
- 39%** "The number of ways they can securely interact with us is limited"
- 39%** "We still ask them to fax or mail documents and forms to us"
- 25%** "Our existing email encryption process is cumbersome"
- 18%** "They are forced to create a second user ID to communicate through our portal"
- 18%** Other

What appeals to you most about the ability to exchange confidential forms and documents?



Customer Experience 'Wish List'

- 41%** Secure electronic forms and signatures
- 40%** Secure document exchange from the customer portal
- 31%** Secure messaging from the customer portal
- 29%** Secure email direct from the customer's inbox
- 21%** Other



say they are largely focused on improving customer experience

What capabilities would help you better support your customers?

