

Groove for Salesforce Financial Services Cloud

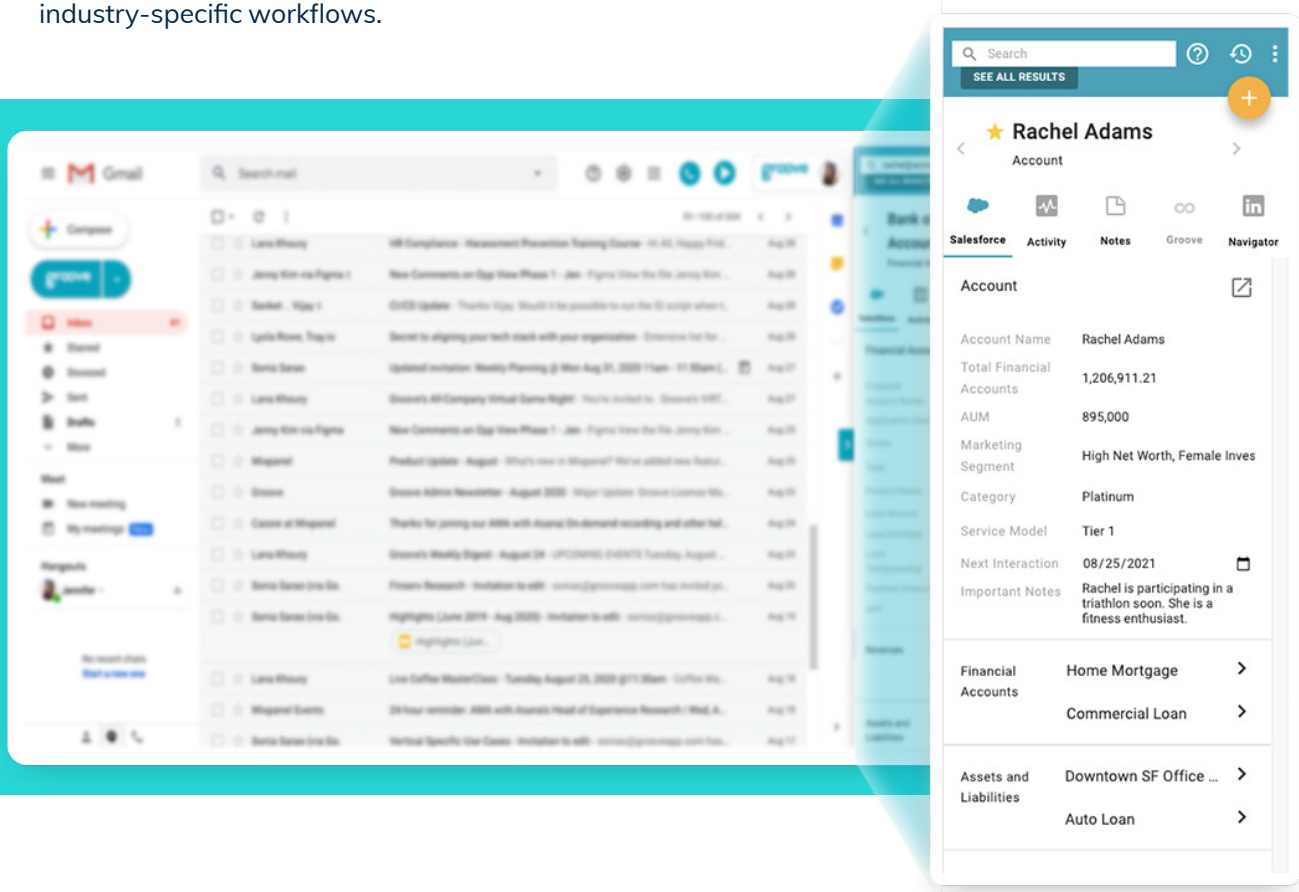


Accelerate Digital Transformation in a Digital First World

Build Lasting Relationships, Remotely or In-Person

Groove for Salesforce Financial Services Cloud surfaces real-time CRM information in the inbox, so that relationship managers and financial advisors can deliver personalized wealth management advice at scale across any channel or device.

- Automatically keep Salesforce up-to-date with all emails, calls and LinkedIn interactions, while using automation to stay on top of less active accounts.
- Sales management benefits from real-time visibility into activity levels and outcomes, instantly logging emails, calls, SMS messages, and LinkedIn correspondence to custom objects and industry-specific workflows.

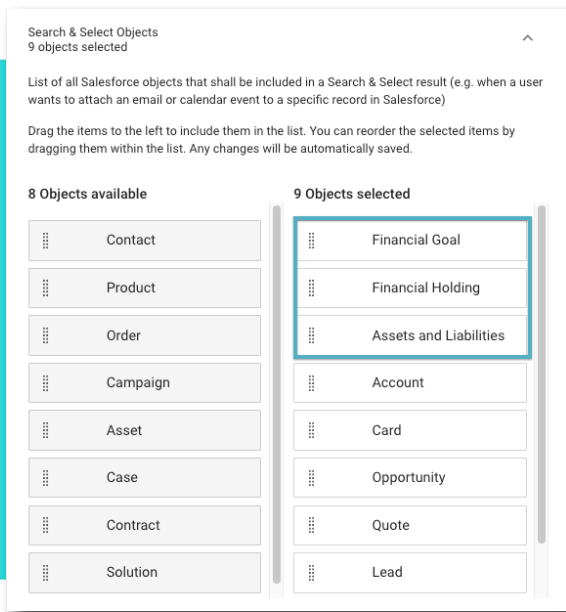


- Email and Calendar Integration
- Automated Dialer
- Advanced Activity Capture
- Integrated Meeting Scheduler
- Multi-thread Email Sequencing
- Cross-channel Touch Automation
- Templatize Email and Call Scripts
- Prioritize highest-value Activities
- Collaborate on Account Lists
- Sales Performance Analytics
- Guided Selling

Groove for Salesforce Financial Services Cloud



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Quickly Realize Time to Value without a Heavy IT Lift

Groove offers the only sales engagement platform that is pre-configured to work with the unique data model of Salesforce Financial Services Industry Cloud.

- Selectively sync to custom fields and objects modeling financial accounts, assets, liabilities, and goals for both individual clients and across entire households.
- IT teams no longer have to spend time and money customizing their sales engagement platform to speak the language of their firm.

Keep Your Sensitive Client Data Secure

Ensure that sensitive client data remains secure by reducing the need to sync sensitive PII with a third-party database.

- Groove maintains Salesforce as the system of record and prevents sellers from emailing lists of contacts that aren't in Salesforce.
- Groove is compliant with global privacy laws, including SOC-2 GDPR, and CCPA.



“By enabling our reps to automate workflows for loan disbursement programs, search account history from their inbox, and streamline email, calendar, and scheduling activities, Groove saves them hours every day that they can reinvest in higher-value activities like growing their book of business.”

DIEGO BLANCO MORENO, DIRECTOR OF DIGITAL SERVICES