



Prioritize client needs with CTI for financial services institutions

InGenius connects your existing phone system with Salesforce so your advisors can focus exclusively on client needs instead of juggling multiple applications.

Exceptional customer service is extremely important in the financial services industry, where a premium is placed on building trust and developing solid customer relationships. Customer satisfaction is proven to improve loyalty across different lines of business. InGenius enables wealth management firms, insurance companies, capital markets and banks with the engagement tools they need to build deep client relationships.

**Upland InGenius
on the AppExchange**



Visit us on the AppExchange



Increase advisor productivity

Features like pop to Salesforce Lightning flow, preview dialer, predictive dialer*, and progressive dialer** boost productivity.

Keep client information secure

Keep your information secure with infrastructure designed to protect to the highest standards. InGenius works with existing data security and encryption methods.

Personalize communications

Quickly and efficiently support meaningful customer interactions with a consolidated advisor view of customer data. Screen pop gives inbound calls context so advisors can quickly see all customer information before a call is connected and then tailor the customer experience.

Capture all interactions

Automated call logging captures important details consistently for every call. Admins can configure templates and wrap-up codes for streamlined and standardized documentation. InGenius offers easy reporting and dashboard views that enable smart client management.

*available with Cisco UCCE

**available with Cisco UCCX

InGenius offers certified integration between the leading telephony platforms and Salesforce.

AVAYA

twilio

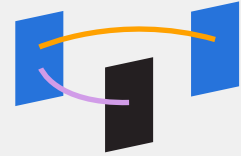
CISCO

GENESYS™



Implementing InGenius was smooth and simple. It wasn't a lot of effort to have a huge impact on our organization.

Justin Glass, Chief Digital Officer
United Wholesale Mortgage



InGenius helps customers bring the latest Salesforce innovations to life, including Omni-channel and Service Cloud Voice -bring your own telephony (BYOT) with InGenius!

High-performing financial services institutions choose InGenius to drive results

AG FINANCIAL SOLUTIONS

Ameriprise Financial

BNY MELLON

Brinker Capital

E*TRADE

intact INSURANCE

LIBERUM

LoanMe

PayActiv

Quantum

UWM UNITED WHOLESALE MORTGAGE

ZURICH

Speak to us about supercharging productivity and strengthening your customer relationships today!

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