

Thoughts from the Top



featuring

Priya Bajoria

Financial Services North America
Practice Leader, East and Canada

Priya Bajoria is a Senior Vice President leading the Financial Services business of Publicis Sapient on the East Coast and Canada. She leads strategic client relationships globally with a focus on solving complex business problems utilizing strategy consulting, experience design and advances in technology engineering. Priya is based in New York, NY.



What are some trends that you have seen over the past few years within the Financial Services space?

The last 18-24 months have been unprecedented as far as financial services are concerned and digital transformation has been at the forefront. Prior to the pandemic, there was a heavy focus on the retail consumer, specifically around digital solutions and customer experiences. Now we are seeing this focus expand across institutional clients and corporate consumers. There is also an internal focus on employees and how the employee experience plays into productivity.

Another theme we are seeing is around differentiation - how can you make an impact that stands out against what other firms are offering when everyone is inundated with marketing and solutions emails? The answer is personalization. With the deprecation of third party cookies, the importance of data is magnified. How do you make the customer feel like the digital interaction they receive is actually tailored specifically for them? The more you understand your customers, the more you are able to offer a personalized and compelling experience. Each interaction is an opportunity to better know the customer and continue to tailor experiences to expand the lifetime value of the customer.



How do you see Salesforce playing a role as it pertains to the future of the Financial Services industry?

Salesforce provides a full end-to-end stack for fulfilling clients' initiatives as it relates to data driven personalization, but the key is working to fit it seamlessly into the organization's existing operating model. When looking at personalization capabilities we are able to identify opportunities such as engagement to drive enhanced service experiences, increased cross-selling and up-selling opportunities with Next Best Action/Offer to expand the customer lifetime value as part of the strategy.

The other area that we are seeing Salesforce exceed expectations is in the employee experience arena. The employee experience has a major impact on all areas of the business and deploying solutions like Experience Cloud and Slack into an organization leads to more positive interactions, and a more

Our role as a trusted top Salesforce partner is showcasing how to best leverage our clients' existing Salesforce footprint to drive the banks of the future, drive higher AUM for Wealth & Asset Management firms, and improve growth and competitive advantage for Insurers.

productive and collaborative environment. Teams can share ideas and work products to drive higher productivity and efficiency, adding to the financial institution's bottom line.



Can you share more about how we have helped enterprise level clients differentiate themselves?

We're currently helping an enterprise level Wealth Management firm understand how to enable their clients and prospects with preferences for communication and engagement. Instead of blasting marketing materials to everyone, this client is opting to give their clients a choice as a way to provide the most tailored and relevant content, as well as reduce the risk of having someone opt out of all future communications. By putting the selection of preference into the hands of the consumer, it enables them to have the power to receive curated information and even select the delivery method of that content. This leads to getting the right content to the right person via the right channel, at the right time.

For another Financial Services organization, we are tracking customer and prospect engagement on their website. What are they clicking on? Are they watching a webinar? Based on the type of engagement, there is a more informed path forward to convert the prospect or identify cross-sell and up-sell opportunities. The goal is eventually to move beyond just activity and engagement based on their web behavior, to marry that data with other known customer data, such as their customer service experience, demographic factors, etc., to continue to create a more comprehensive profile. This will allow them to send communications knowing that the recipient of the message believes it is unique to their needs.



What is the best way for Salesforce to engage with Publicis Sapient?

The key in all of our partnerships is really being able to understand our client. We want to work together to understand the business problem that the client is trying to solve and then work with Salesforce to get their perspectives. We are able to bring our

teams together early in the process to get a holistic understanding of what the client is looking to do so we are able to create a customized offering for them. This joint solution building leads to deeper and more relevant and meaningful solutions for our clients.



What about the "Salesforce Ohana" and culture sticks out in your mind?

Publicis Sapient's value systems are identical to that of Salesforce, which is probably why we work so well together. There are obvious parallels between the two, such as putting people first, which allows us to collaborate in the best interest of our client at all

times. Both teams are also innovative thinkers, which enables us to come to the table with an offering that will continue to propel our clients forward and stay ahead of the competition.