

Thoughts from the Top



featuring

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Vini Nair is a digital business transformation leader in the Financial Services industry for more than two decades and has been with Publicis Sapient for 15+ years. She is based in Southern California and currently serves as Group Vice President leading Publicis Sapient Financial services business for West and Mid-West regions in North America.



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

There are probably three or four key trends that come to mind, but the biggest one is going to be centered around digitalization. In-person interactions are not going away anytime soon because people are craving human interaction, however over the past few years we have seen everything shift to a digital forward way of working and will continue to do so looking ahead. What matters even more is how you become more personal to customers even in a digital environment.

But it's not just about digitalization when it comes to consumers being able to access their services through an omnichannel experience. It is also about the

digital transformation in terms of the middle office and back office as well. What is it that is supporting these digital experiences?

For our clients, it is going to be emerging technologies enabling this across the board. With anything from data analytics to blockchain, there is a core technology transformation that stands behind it, and the data powering it is imperative. Companies are asking now more than ever how can I bring in an integrated view of the data? How can I really get an understanding of my customer?



How do you see Salesforce assisting in the digitalization transformation?

One area Salesforce plays a large role in is improving the customer experience that our clients are providing.

How can you provide a seamless and personalized customer experience?

Salesforce provides these capabilities starting with the foundation of a Customer Data Platform (CDP) where all of the data can be aggregated and compiled to provide a 360 degree view of the customer. Once this view of the customer has been created then you can make educated choices in how you communicate with your clients to create better engagement.

We have also partnered with Epsilon, a Publicis Groupe Company, to create CDP Essentials which is a data enrichment capability to bring the

customer profile from unknown to known. This expands the value of Salesforce CDP and delivers true hyper-personalization at scale. In the highly competitive sub-verticals of Banking, Wealth & Asset Management and Insurance, firms must capture prospective customers in the digital layer, and CDP + CDPE make that possible.

We also have many clients who are evaluating Financial Services Cloud to see if it is a good fit for the current state of their business. Our role is to provide assessments for them based on use cases that align to their specific requirements and from there we can identify if it is truly the right fit. FSC brings an industry-specific data model and extends the capabilities of classic Sales & Service Cloud to support FINS firms' strategic imperatives.



Can you share an example of where this work is coming to life?

We are currently working with a large enterprise wealth manager in assessing Customer Data Platforms (CDPs) from a feature function standpoint and we had to advise them to take a step back and take a use case-based approach to ensure that if they're going to be investing in a CDP, it ties back to their business needs, use case and objectives. It was crucial from the beginning of the project that all of the needs and challenges of the business were understood, so that they could enable the technology to work for them and not the other way around.

Additionally, we recently helped an asset management firm select Financial Services Cloud to bring their sales and services functions into the future. This project centered on how to help them provide the highest level of support for their customers, greater engagement through enhanced experiences, and a true 360-degree view of their clients. An additional benefit of the selection of FSC is that its built-in AI and Machine Learning will make their distribution and service associates highly productive and efficient.



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

As a global Platinum partner, our Salesforce Engagement Managers and Client Partners work very closely with Salesforce Account teams and regional leaders to do in-depth account planning that supports our shared clients' business objectives.

The teams maintain a regular cadence and metrics are put in place to ensure delivery on the clients' desired outcomes. This collaboration is key to our team staying up-to-date on Salesforce's many innovations, and allows us to keep them informed of our solution advancements. Salesforce is our #1 technology partner—by at least 3X any other partner—and we treasure this fantastic partnership.



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

There are three things that stand out the most, with the first being collaborative approaches. The second is a customer-first mindset, and the third is around trust.

I believe those three things align our organizations in a way that better supports our clients in their engagements and leads to successful relationships.