



# Who We Help with Banking Technology

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From the CEO to the customer, Troinet helps everyone in your business with banking technology. We provide solutions to the common pain points everyone experiences by improving efficiency, increasing profitability, and so much more.

## CEO

Bank executives look for opportunities to reduce overhead expenses to increase profitability and operate the financial institution more efficiently. In other words, bank CEO's and officers are expected to do the impossible!

## *Common Pain Points*

- Improve customer relationships and service to retain existing customers and attract new customers

- Reduce operating expenses without decreasing productivity
- Justify ROI for any new technology infrastructure
- Improve internal efficiency and communications

### *Solution & Benefits*

Our banking technology solutions help improve the efficiency of your operations and generate more revenue, while reducing costs in multiple expense categories such as:

- Decrease travel expenses
- Decrease energy consumption
- Decrease technology equipment for a lower TCO and increased ROI

### **Board Members**

Board members may not always work from an internal office within your financial institution, but they need access to administrative documents and the banking staff from wherever they may be physically located. Readily-accessible information is the key for good decision making by board members.

### *Common Pain Points*

- Need access to data and information when not physically at the financial institution

- Need to make decisions quickly, but don't always have the information needed to make an educated and informed decision
- Need improve communication and collaboration with other board members and staff regardless of physical location

### *Solution & Benefits*

Our financial technology solutions can overcome the most common challenges board members face when trying to make good decisions and keep their financial institutions moving forward:

- Increased and improved use of technology allows for more informed decision-making
- Access administrative documents and the financial institution network securely from anywhere on any device
- Maintain efficient communications with other board members and employees through upgraded technology tools and Unified Communications
- Ensure all data is properly backed up, whether it is used onsite at the financial institution, from a mobile device, or from a board member's home

### **Sales Professional**

As a sales professional in the financial industry, it is up to you to communicate the available products and services to prospective customers and help

them choose the ones that best fit their needs. In order to do this successfully, you need to understand the frequently changing needs and wants of your prospective customer. Solid communication methods and communications technology solutions can make your task easier.

### *Common Pain Points*

- If multiple staff members talk to prospective customers over time, sales professionals may not have all of the information needed to complete the sale
- Individuals may not always say what they mean on audio-only phone calls, but meeting prospects in person or via video call would give the sales professional body language feedback

### *Solution & Benefits*

Integrating your communications into a Unified Communications solution gives sales professionals the technology solutions they need to understand the challenges prospective customers face with their finances. When you can view a customer's banking habits, keep all information and conversation details about a customer in one place, and move that information easily between sales professionals, you'll be better prepared to meet the changing needs of your customers.

- Provide instant communications with prospects through online chat and even face-to-face video meetings without the need to travel

- Instantly and effortlessly bring your best “sales closers” onto calls with the touch of a button

## Customer

Today's bank customer expects technology to make their life more convenient. Younger generations prefer to do their banking over the phone, via mobile devices, or online. Visiting the bank branch is not as common for the millennial generation, and technology should address their preferences and encourage them to choose your bank over financial institutions that do not provide alternative forms of banking.

## *Common Pain Points*

- Creating secure and always-available access to customer accounts via customer-chosen devices.
- Staying in contact with customers who do not visit the bank weekly to make deposits or withdraw money in order to offer them additional products and services.
- Providing exceptional customer service that helps generate loyalty among customers who know they have virtually unlimited options for their banking needs.

## *Solution & Benefits*

Technology provides the tools your bank needs to provide outstanding customer service and satisfy customers who demand convenient options for their banking needs. Our banking technology solutions will:

- Establish a secure network for BYOD and ensuring network security for mobile devices
- Ensure network security, data backup, and compliance regulations are met
- Integrate your communications methods so you are better able to provide a quality customer service method



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