



What is the Cisco® Wealth Management Desktop solution?

The Cisco Wealth Management Desktop solution is a flexible, cost-effective tool for delivering wealth management services to high-value customers. The solution integrates the Cisco Unified Call Connector, Cisco Unified Communications Manager or Communications Manager Express (depending on size requirements), and Cisco IP phones with the Salesforce Wealth Management Edition.

What is the value of the Cisco Wealth Management Desktop solution?

The Cisco Wealth Management Desktop solution brings the substantial productivity benefits of Cisco IP Communications to Salesforce.com users. Cisco research shows that IP Communications provide quantifiable time-savings, so busy financial professionals can work more productively (Table 1).

What problems does this solution address?

- The difficulty of providing competitive service levels to a demanding customer segment
- High cost of maintaining older information management systems
- Limited productivity of time available to wealth management advisors
- Need to accelerate and simplify information access from diverse locations

What capabilities does the Cisco Wealth Management Desktop solution deliver?

The Cisco Wealth Management Desktop solution provides key features such as On-Demand CRM for Wealth Management, award-winning ease-of-use that facilitates end-user adoption and compliance, point-and-click customization to meet the needs of individual advisors, and industry-leading CRM features to manage client data and team activities.

Table 1 IP Communications Increase Productivity

IP Communications Benefit	Savings
Improved remote office employee productivity	4.3 hours per remote worker per week or 28 days per year
Improved telecommuter productivity	5 hours per week, or 33 days per year
Reduced travel expenses for IT	13 hours per month per IT employee; 19 days per year
Faster moves, adds, and changes (MACs)	.5 hours per move
IT and end-user productivity benefits because features are easier to use	.5 hours per week per IT employee involved with phone support
Easier MAC process for employees	3 more moves per year
Less "telephone tag" for all employees	3.9 hours per week per employee or 25 days per year

Can the Cisco Wealth Management Desktop solution help support regulatory compliance?

The Cisco Wealth Management Desktop solution helps support regulatory compliance by recording the interaction and activity related to each customer and by providing a secure, highly reliable environment.

- Workflow automation can require and track approvals for specific actions
- Audit trails provide data for comprehensive compliance documentation
- Integrated backup capabilities support regulatory compliance and service-delivery standards

What components are included in the Cisco Wealth Management Desktop solution?

- Applications
 - Salesforce Wealth Management Edition with Cisco Unified Call Connector
 - Cisco Unified Communications Manager (for large enterprises) or Communications Manager Express (for small businesses)
- Endpoints
 - Cisco Unified IP phones and Cisco Unified wireless IP phones

What benefits can I achieve from the Cisco Wealth Management Desktop solution?

With this solution, you can:

- Compete successfully for High Net Worth Individual (HNWI) customers by providing better customer service
- Achieve regulatory compliance through automated tracking systems
- Reduce telephony costs by eliminating toll charges and recurring leased-line fees and reducing the cost of adds, moves, and changes
- Simplify your work environment by providing unified messaging that lets users access and manage voice mail, e-mail, and fax messages from a single inbox
- Easily customize your communications applications for an agile business environment

Why Cisco?

The Cisco Wealth Management Desktop solution can dramatically increase the productivity of Salesforce.com users by providing a highly secure and scalable voice, video, and data communications platform. This comprehensive, best-in-class solution combines Cisco network reliability with Salesforce.com CRM expertise to effectively serve the HNWI market. In addition:

- Cisco Self-Defending Networks give financial institutions a foundation for meeting security, legal, and regulatory challenges
- A select ecosystem of partners provides best-in-class capabilities
- An incremental upgrade model protects customer investments
- A gradual migration path helps reduce risk in mission-critical environments such as branch applications