

Desktop as a Service (DaaS)

Use Cases in the Financial Services Industry

Use Case: Deliver customized experiences and improve share of wallet



The Business Need

In the face of disruption from new age FinTechs, financial services firms need to accelerate customer acquisition, increase customer loyalty, and reduce cycle time by delivering services at customers' doorsteps. By providing their mobile field staff with secure access to customer information and business applications, firms can create customized and more engaging offerings for customers in a location-agnostic model.



DesktopReady Advantage

DesktopReady provides end users such as sales agents, portfolio managers, insurance inspectors/agents, personal bankers, and wealth managers with real-time access to customer analytics and onboarding platforms, market data, risk models, and quote-generation models to improve competitiveness and better serve their customers at a time and location of their convenience.



Benefits

- Improved upsell and cross-sell opportunities for associated services (credit cards, loans, insurance policies, etc.)
- New business acquisition (customer targeting, acquisition, and onboarding)
- Enhanced customer satisfaction through customized offerings
- Adherence to data privacy laws

About DesktopReady

DesktopReady is a modern fully managed Desktop as a Service (DaaS) with built-in automation and monitoring that simplifies the delivery and management of cloud desktops for the unique needs of companies that want to spend less time on IT. Developed using Windows Virtual Desktop (WVD) infrastructure within the Microsoft Azure cloud, DesktopReady provides fully functional Windows 10 desktops that are easy to install, configure and ready within minutes. The highly secure cloud desktops are built on platforms that are PCI, HIPAA and SOC2 compliant and supported by 24/7 service desk and infrastructure monitoring. For more information about DesktopReady, visit www.desktopready.com

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