



Unblu

Reinventing digital customer relations

Unblu Meet

A secure place for customer contact

Personalized advice tailored to individual customer requirements is the best way to retain customers and improve their satisfaction and loyalty. Consultations can be planned or held at short notice securely and in compliance with GDPR on our digitization specialist's communication platform Unblu Meet. This platform enables advisors to provide flexible, appealing and highly informative meetings using a range of seamlessly integrated digital tools.

What's Unblu Meet?

Unblu Meet's various communication channels, including tools such as co-browsing and video calls, enable advisors to communicate with their customers in the way that suits them best. Advisors can guide customers through complex topics with ease and then close deals at the right time. This avoids procedures being aborted and generates greater revenue. All

consultations and relevant information can be stored easily and securely in a single location. This makes the process easier for advisors and customers alike. Unblu Meet creates a permanent, secure zone where customers and advisors can meet to exchange information and conclude deals.

The benefits for you

Improved customer experience

- Personalized, secure online advice tailored to customer requirements
- Efficient consultation right through to conclusion of the contract

Comprehensive user-friendliness

- Various digital tools can be combined to create a single customer journey where advisors and customers can switch seamlessly between solutions and channels when needed.

High level of security

- The SecureFlow Manager (SFM) ensures that even the most highly secure applications can be accessed safely. Unblu Meet's technology can also be integrated into existing security settings without affecting them.
- Unblu Meet is hosted in Europe and runs on its own media server to ensure that EU data remains within the EU.

Easy implementation

- Unblu Meet requires no downloads or installations for end users.
- A local installation is available. Other options include the Unblu Financial Cloud or a dedicated cloud operated by Unblu.
- The implementation method allows full operational readiness within one month. Thanks to the modular system, functions can be licensed as required without activating an additional installation project.

Full compliance

- Data protection (GDPR rules engine), audit trail access, masking, encrypted archiving and geofencing ensure Unblu Meet's conversational tools comply with the required regulations.



How Unblu Meet works

Unblu Meet provides full functionality in a browser-based application and an intuitive user interface for advisors and customers. Complex products can be presented easily and securely and viewed and used jointly with meeting participants. Thanks to the legally binding and secure signature through the KYC process, contracts can be concluded easily, securely and quickly. Meetings can be recorded and archived in conformity with the law, ensuring that compliance is guaranteed. Unblu Meet is also available on the MS Teams Marketplace, without detracting from the convenience of Microsoft software.

What lies behind Unblu Meet

The range of features includes chat functions and options for planning meetings and holding audio or video consultations or presentations.

Compatible with other interfaces

Unblu Meet's platform is compliant with the required financial regulations and can be integrated safely into existing security set-ups.

The screenshot displays the Unblu Meet interface. The main content area shows a presentation slide titled "Eigene Mittel – was darf beim Immobilienkauf verwendet werden?". The slide contains a table of self-savings capital (Selbsterspartes Eigenkapital) and a section for pension funds (Pensionskassengelder).

Selbsterspartes Eigenkapital	
Sparkonto Person 1	10'232
Sparkonto Person 2	52'301
Wertschriftendepot Person 1	0
Wertschriftendepot Person 2	10'000
Rückkaufswert Lebensversicherungspolice	0
Sparguthaben Säule-3a-Konto Person 1	32'000
Sparguthaben Säule-3a-Konto Person 2	32'000
Erbvorbezug	120'000
Schenkung	0
Zwischentotal (Selbsterspartes Eigenkapital)	256'533

Das selbstersparte Eigenkapital muss mind. 10 % des Kaufpreises betragen.

Pensionskassengelder

The interface also features a control panel on the right titled "Beraterleiste" with various functions: Berater einladen, Teilnehmer stumm schalten, Teilnehmer einladen, Teilnehmer trennen, Kamera Einstellungen, Aufzeichnung starten/stoppen, Bildschirm teilen, Dokument Co-Browsing, and Notizblock. At the bottom, there are icons for microphone, video, screen sharing, chat, and phone. A video feed at the bottom right shows two participants in a meeting.

Unblu Spark

Conversation experiences that inspire customers

Bring customers and advisors closer together. The Unblu Spark communication platform from our digitization specialist improves the digital customer experience across all channels.

What is Unblu Spark?

Support from conversational AI

Lower your FCR (first contact resolution) rate by equipping your customer service staff with an easy-to-train digital assistant (chatbot) that takes care of simple enquiries – and escalates to customer service staff when needed.

Consult with Secure Messenger

Place your advisors in your customers' pockets with an in-app text messaging feature that maximizes the quality of customer interaction and is always secure and legally compliant.

Use video and audio conversations

Whether planned or spontaneous, benefit from a secure, high-quality and fully integrated feature that allows you to connect with customers and close more deals.

Manage complex tasks with co-browsing

Share, navigate and obtain legally binding signatures by browsing documents or webpages as if you were in the same room as your customer – in a legally compliant manner, of course.



The benefits for you

- Efficiency improvement through the natural exchange of information with customers. A choice of text messages, calls or collaboration reduces the time spent on resolving problems and improves the customer experience, sales figures and efficiency.
- Relationship managers impress with their expertise, and opportunities for upselling or product introductions will arise.
- The sales potential of service staff can be increased by offering customized products at just the right time, maximizing conversion rates.
- The customer relationship can be personalized, and secure communications options can be expanded over the long term.
- A positive, consistent contact center experience and more efficient employees.





How Unblu Spark works

Unblu Spark provides your customers with the perfect omnichannel experience. From chatbot to text messages with WhatsApp integration, audio and voice, screensharing, co-browsing and digital signatures, it covers the entire collaboration process with customers.

[Go to the video](#)

Compatible with other interfaces

Unblu Spark has interfaces and integrations with many key providers and products in the financial services industry, such as MS Teams, Rasa, Kore.ai, Genesys, Verint, Cisco, Avaya, Salesforce, MS Dynamics CRM, bsi, WhatsApp, Facebook Messenger and Apple Business Chat.

[Find out more](#)

What lies behind Unblu Spark
Find out more on the Unblu repositories



Unblu Branch

The perfect customer experience at your branch

The branch of the future combines the best of virtual and personal customer experiences. With Unblu Branch from our digitization specialist, you'll blur the lines between the physical and virtual customer experience perfectly on-site at your branch. The solution is cost-efficient, profitable and ensures outstanding service. A personal experience – yet digital.

What's Unblu Branch?

Digital yet personal! With the branch of the future, you'll offer your customers the usual personal customer experience, but in a more cost-effective way that combines the virtual and personal customer experience. Unblu Branch combines the best from the analogue and digital worlds, simplifying customer acquisition, customer retention and upselling. A holistic customer experience with optimal quality of advice, reduced waiting times and intuitive, easy access. The branch can be controlled remotely at the touch of a button: touchpads, printers, ID checks, lockers and much more. This means the conversation continues to flow regardless of any logistical problems.

The benefits for you

Consistent customer experience

- Unique digital customer experience physically on-site at the branch
- Optimal flexibility and scalability

Cost savings

- Costs for the set-up of a branch amounting to CHF 3,000,000 to CHF 4,000,000 can be cut to CHF 500,000 to CHF 900,000.
- Costs for branch staff can be reduced significantly.

Business growth

- Limitless expansion opportunities in new regions

How Unblu Branch works

Your customers are greeted at reception by an employee from the customer center via video call. After an initial needs assessment, the customer is guided to self-service, a personal video consultation or – for more in-depth advice – to an available customer advisor. In the self-service area, employees from the customer center also provide support via video call if necessary. Here customers can perform tasks such as opening an account online, using e-banking or making an appointment for a consultation online. Thanks to a high-performance camera, customer documents can also be scanned conveniently.

Video on the process using the customer Valiant as an example

What lies behind Unblu Branch

Digital yet personal: the new branches combine these two attributes in an innovative way. The new type of branch combines personal advice with digital banking services and is much more cost-efficient than traditional bank branches.

Compatible with other interfaces

Dialogue is managed via a stand-alone, individually configurable dialogue system. The basic features include a (touch) display, HD camera, directional microphones, loudspeakers or sound shower, sensors or physical buttons. Third-party systems, such as sign pads, printers, doors or lockers, etc., can also be integrated seamlessly and controlled via interfaces.

