

Digital Transformation for Financial Services



PHASE 1

Plan your Journey

1

Understand where you are today



- + Do you offer a flexible framework of APIs and mobile apps that can be tailored to customer needs?
- + How will your tech stack integrate with your core platform moving forward?

Determine where you want to be in the future

78%

of financial services leaders forecast an increase in digital customer engagement in the next 12-18 months.

- + Be realistic about the competitive landscape.
- + Make a list of must-haves vs. nice-to-haves.
- + Develop a cost-benefit analysis of your technology options.



PHASE 2

Activate your digital transformation game plan

3

Manage digital transformation in phases



- + Ensure that your network is able to securely support your future digital transformation goals.
- + Implement a unified communications platform that provides voice and video chat, improves internal collaboration and enhances customer experience.

Establish vendor relationships

82%

of financial services leaders indicate that their teams need to use 3 or more applications or programs to have a complete view of their customer.

- + Seek out strategic partners who can help you design and implement the right solutions for your needs.
- + Consider a solutions provider that can bring all your must-haves together under one vendor to reduce complexity and cost.

4



5

Build and stick to a timeline



- + Set success metrics and measure them at each milestone.
- + Tweak and improve implementation as needed.
- + Keep a vision of the endgame front and center for your team throughout the digital transformation process.

Cloud-enabled connectivity, communications and security. Guaranteed.

Windstream Enterprise drives business transformation through the convergence of our proprietary software solutions and cloud-optimized network to unlock your revenue and profitability potential. Rely on our financial stability, unrivaled service guarantees and best-in-class management portal—delivered by a team of technology experts.

To learn more, visit [windstreamenterprise.com](https://www.windstreamenterprise.com)