



THREE HYBRID WORK CHALLENGES IN FINANCIAL SERVICES

(AND HOW TO OVERCOME THEM)



While handshakes and face-to-face meetings are still critical to building client relationships, more and more of the daily work of Financial Services professionals is taking place virtually.



90% OF FINANCIAL PROFESSIONALS

would prefer a mix of office-based and remote work in a post COVID-19 environment.¹

CHALLENGE #1

Navigating the Subtleties of Dealmaking

The financial services industry is built on face-to-face relationships. High-stakes **mergers and acquisitions** often hinge on subtle emotional cues and body language as much as they do numbers, but in-person meetings are now limited.



SOLUTION

Elevate the virtual meeting experience to capture more non-verbal communication, enhance your professional appearance, and bring your soft skills to the digital screen. To do so, professional-grade audio and video devices brighten your appearance, intelligently track speaker movements, and mute background noises during pitch delivery.

CHALLENGE #2

Providing a White-Glove Experience to Clients

Heightened volatility in the markets rattled client portfolios at a time when in-person meetings became near-impossible. **Wealth managers** and **financial advisors**—keen to reestablish connections while respecting safety concerns—aim to provide enhanced accessibility for portfolio reassurances.



SOLUTION

Capitalize on clients' increasing comfort with digital service offerings and desire for ad-hoc check-ins with an “anywhere, anytime” approach to video meetings. Virtual engagements should be free of background noise and have good lighting to instill trust and portfolio comfort from all settings.

CHALLENGE #3

Humanizing the Virtual Contact Center

Investing in the digital customer experience is now imperative for both member loyalty and employee retention. The new business model must preserve face-to-face, personal service as a fundamental differentiator, while also meeting **contact center agent** demands for better work-life balance.



SOLUTION

Invest in omnichannel contact center software that enables personalized customer experience and empowers agents to be active from anywhere, including at home in a noise-block environment with high-quality optics.

ARE YOU READY TO MEET THE CHALLENGES OF HYBRID WORK?

Read our eBook *Hybrid Work in Financial Services: Risk or Opportunity?* to learn how firms will approach hybrid work as either risk or opportunity for their client relationships, operations, and talent retention. Your approach today will keep your business relevant in a work-from-anywhere world.

[DOWNLOAD THE E-BOOK >](#)
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1: Humans in Finance, Remote Working in Finance: COVID-19 & Beyond, September 2020
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