

Note:

The following slides are selected **excerpts from a larger presentation deck.**

Content has been modified and anonymized to preserve confidentiality.

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State Street's Workforce Platform, powered by Salesforce

An actionable vision for Client Servicing & beyond,
built on Salesforce.

Here's what we're going to talk about **today...**

01 Kickoff, Intros & Agenda

5 min

02 STT Operational Priorities, Data & Architecture

25 min

03 Salesforce 101 & Our Transformation Together

25 min

04 Recommended Path Forward

5 min



Kickoff & Introductions

State Street can create **\$1B in business benefit** with a platform that optimizes the high cost of human capital to enable long-term retention and growth.

Rather than point solutions, we're proposing State Street embrace a platform that enables **digital labor on a platform that delivers quality experiences** through data, automation, & collaboration across the entire Client lifecycle.



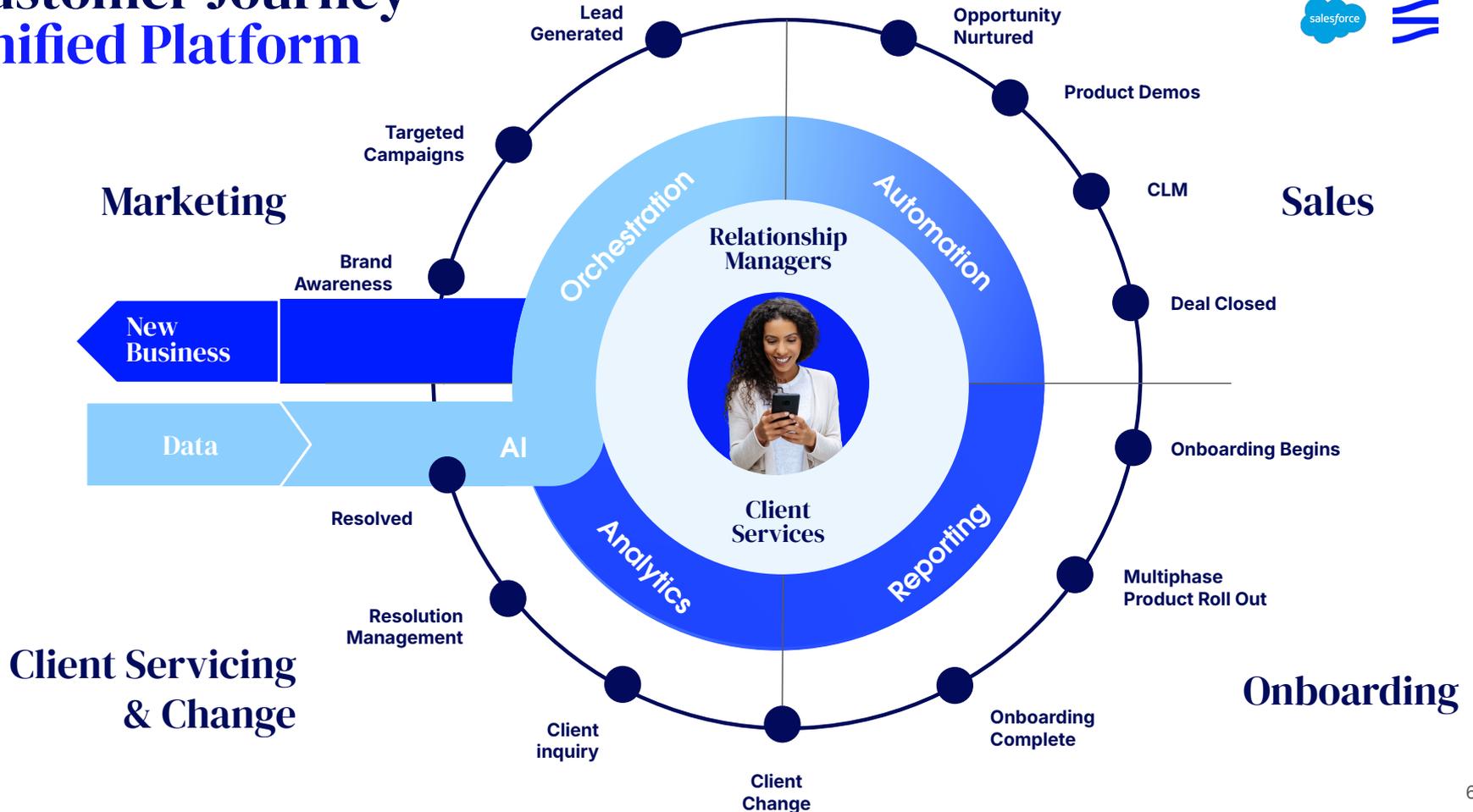
Client Needs

Meet your new Client

Teamans supported by digital labor so they can focus on complex problems & building relationships.



Customer Journey Unified Platform



Leading to a unified, coordinated platform that unlocks the potential of your humans to deliver excellence across Client lifecycle.

You're already well on your way given your use of Salesforce for Lead Mgmt & Growth at STT Global Advisors, as well as, for leadership analytics. Adding service capabilities is the next logical step, but only if we think about how it all connects in a platform.



Delivering critical capabilities along the way, with the end in mind.

3 Month Platform Design Phase

HORIZON 1: 4-6 Months

Efficient Human Labor

Eliminate ~35k Inquiries per Month.

Build a Agent that checks the status of Trades for Customers without any human intervention.

Remove 100% of manual routing.

Build a data-driven Inquiry Mgmt system that automatically routes Inquiries.

Admin Tasks

Client Satisfaction
Delivery Execution

HORIZON 2: 6-8 Months

Human & Digital Labor

Tracking 100% of Client needs & Reducing resolution time by 75%.

Contextual servicing with automated inquiry summaries & Client data so Advisors can know how to respond & resolve instantly.

Admin Tasks

Client Satisfaction
Delivery Execution

~\$600M in Business Value

HORIZON 3: 8-12 Months

Autonomous Workforce

Automating 100% of inquiries.

Attach Agents to a data-driven platform to either resolve issues for Clients or provide Advisors with exactly what they need to resolve inquiries in seconds.

Admin Tasks

Client Satisfaction
Delivery Execution

>\$1B in Business Value

HORIZON 4: 8-12 Months

Human Potential Platform

Convert 30% more Cross/Upsell Opportunities.

Build an Enterprise-wide Platform that enables the entire, end-to-end Client Lifecycle, helping Advisors build stronger relationships than ever before.

Client Satisfaction
Delivery Execution
Relationship Building

Increased Retention

Increased Client Satisfaction

Optimized Workforce

Optimized TCO



You can't, nor can any vendor, do this alone. It requires a deep & strategic partnership that we've already started to build together.

You're already using us in other parts of the business.

Words about where they're already using Salesforce...

We've invested & will continue to invest.

We've invested hundreds of hours into understanding your business so we can stand by our proposal & solution.

There's only one platform that can do this for you.

Based on your specific needs, there is no other platform that can unify the Client lifecycle to unlock the potential of your workforce to create delightful experiences. From sales, to service, to marketing, & retention, Salesforce is the only tool that can help you reach your next horizon.

Thank You.

Now, let's go build your future!

