virtusa

Engineering First

Accelerating financial services with AI-powered precision

In today's complex financial ecosystem, data fragmentation across systems of record (SORs) poses a significant challenge for agents and advisors. Critical information—such as account details, transaction history, knowledge articles, and customer segment data—is often siloed across multiple platforms, slowing down decision-making and weakening the customer experience.

Virtusa's AI-powered financial services solution unifies data through **Salesforce Data Cloud, MuleSoft**, and **conversational AI** to empower agents with real-time insights, guided actions, and seamless workflows, thereby enhancing customer engagement. From streamlining employee group benefits and financial wellness programs to enabling real-time insights and faster resolutions, our solution equips financial institutions to deliver proactive, personalized experiences—helping agents drive better outcomes and customers reach their goals faster.

Use cases for financial services and insurance

Sales	Services	Marketing	Operations
Subscription plan / upgrade / benefit recommendations	Services reply recommendation	Personalized marketing	Churn prediction
Up sell / cross sell	Einstein case and cell summary	Next best action for marketing journey	Portfolio optimization
Sales training and enablement (sales coach)	Knowledge article recommendation	Drive targeted campaign	Compliance monitoring
Risk assessment	Automated account upgrade / address change request approval	Lead scoring	Fraud detection
Personalized products / investment / loan recommendations	Automated case resolution	Marketing trend analysis	Automated notification

Financial services cloud

- Customer 360
- Client coverage
- Action plan templates
- Next best action
- Interaction / events with AI events summary
- Agentforce sales coach
- AI-based portfolio recommendation
- Agentforce account and case summary
- Agentforce AI using unified knowledge

10+ Core actions and prompts

Salesforce Data Cloud

- Data streams from FSC account, contacts, investment portfolio
- Data streams for financial account , transaction, portfolio segment data from different platform SOR's
- Data model object mapping
- Portfolio segmentation
- Cross sell, up sell metrics
- Trigger marketing cloud campaign for target segments with activation targets
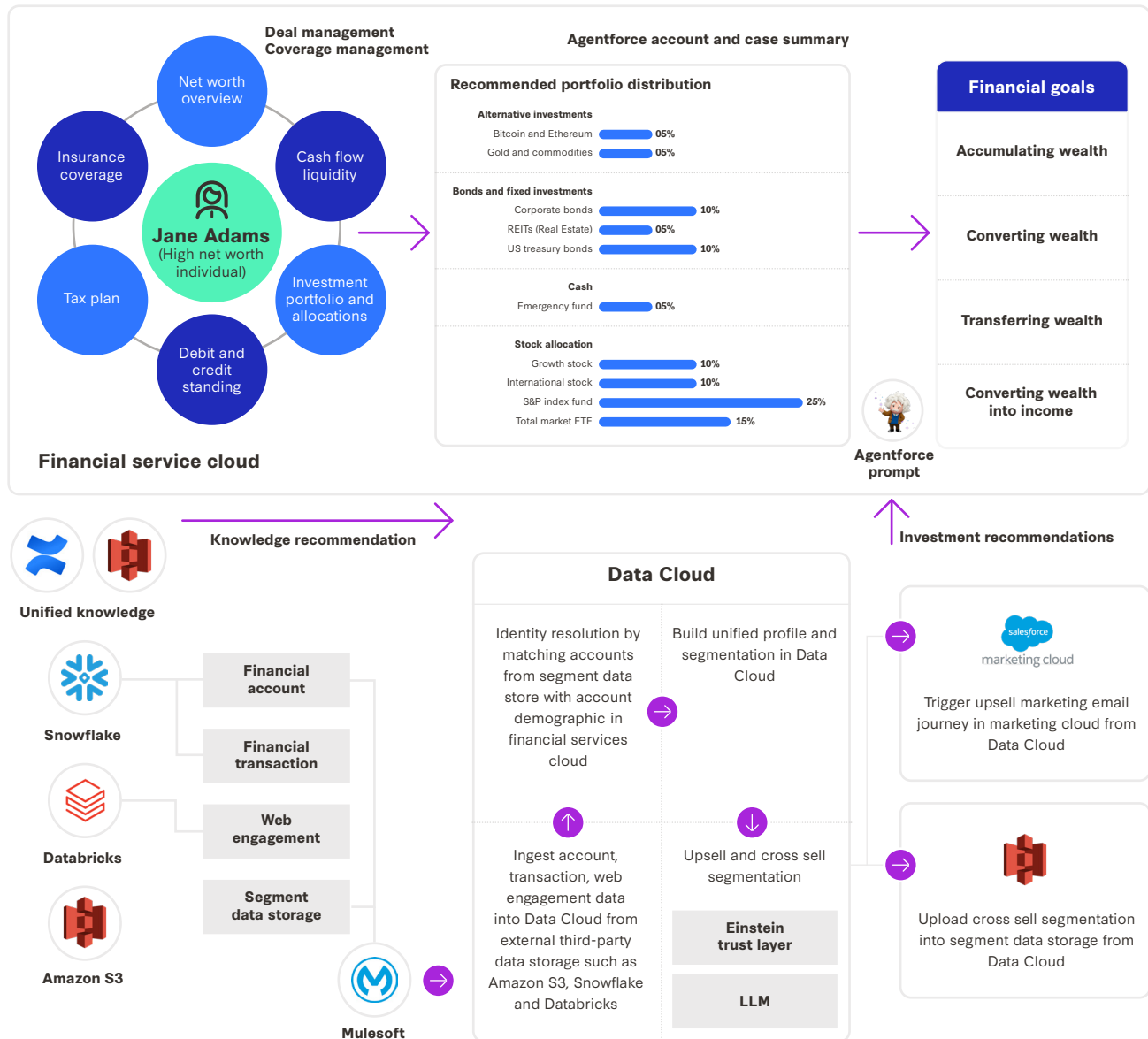
Data Cloud FINS data kit

Mulesoft

- Source financial account, transaction and portfolio segment data from different sources with a system API layer
- Load relevant data into Data Cloud through streaming and bulk API
- Framework to easily connect into different data sources for deployment specific SOR'S
- Update generated portfolio segment data from Data Cloud into SOR's

Pre-built flows for Data Cloud

Capital markets CRM - Achieve financial goals with lightning speed using Agentforce AI, Data Cloud and MuleSoft

Key solution highlights

- Agentic AI based portfolio recommendation to speedup progress towards financial goals
- Ingest financial account, transaction, segment data from different sources into Data Cloud
- Generate segmentation, unified profile, cross sell and up sell recommendations
- Client coverage
- Deal management
- Agentforce account and service case summary
- Agentforce service case inquiry and update
- Unified knowledge resource from S3 and confluence
- AI knowledge recommendation

Key benefits for financial services

AI-powered portfolio recommendations for smarter asset management

Agentic financial deal coach to support dynamic decision-making

Actionable insights with the next best action derived from both structured financial data and unstructured documents

24/7 virtual assistance for group benefit managers to resolve queries anytime

Automated form pre-fill using existing data to accelerate processing

Instant responses to knowledge-based questions

Guided conversations that create service cases with precision and ease

Contextual case summaries with the ability to update them seamlessly

Intent-based portal navigation for quick and intuitive access

Smooth escalation to live agents for handling complex scenarios

Why clients are choosing Virtusa

Virtusa is the preferred choice for financial services organizations because of our:

Industry expertise:
Deep experience in FSI, delivering tailored,
AI-driven solutions

Enhanced productivity:
Potential savings of 30-50% in specific AI use cases
with our proprietary accelerators

Seamless Salesforce integration:
As a Salesforce partner, Virtusa ensures smooth
integration of Agentforce and Data Cloud with
existing Salesforce platforms and other SORs,
enabling easy adoption, seamless data flow, and
enhanced user experience

Proven support:
Track record of successful deployments with
continuous optimization and dedicated support

Success story

Unified customer data drives personalized wealth management

Virtusa unified fragmented customer data for FSC
Wealth Management, equipping bankers with a 360°
client view to act as single points of contact.
This enabled personalized, concierge-style
service for high-net-worth clients across banking,
lending, and wealth. The result: improved customer
satisfaction scores fueled by more relevant, timely,
and seamless engagement

vírtusa
Engineering First

Want to see us in action?

To speak with one of our experts and watch a
live Agentforce solution demo, reach out to us at
marketing@virtusa.com