



## Banker Productivity and Collaboration

Digitization is reshaping how banks and capital markets think about how work gets done.

In an increasingly digital world, banks and capital markets recognize that the new world of banking, powered by tech-savvy employees, brings opportunities to impact the business at a rate never before imagined. Microsoft's banker productivity and collaboration solutions deliver the capabilities banks need to capitalize on emerging digital trends, helping boost employee engagement and agility - while continuing to meet industry security and compliance requirements.

**An optimal productivity and collaboration solution enables digital transformation.**

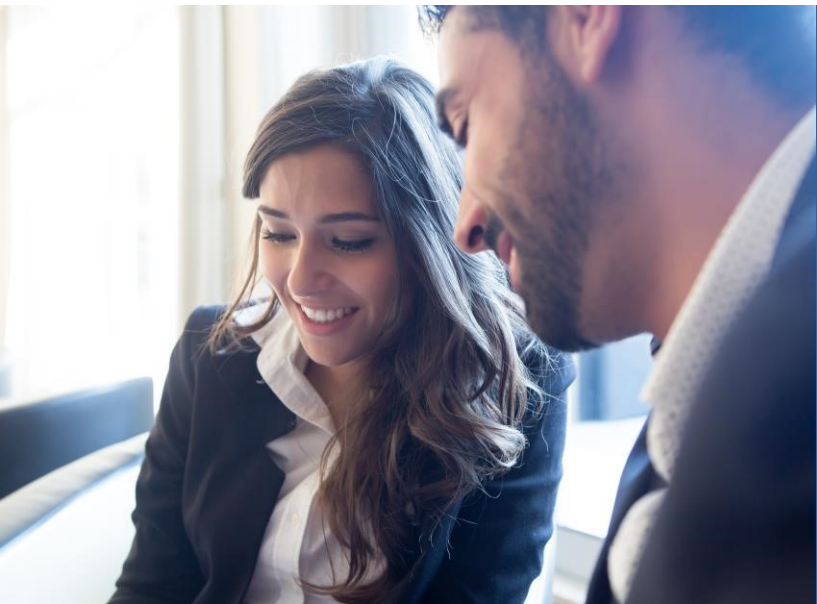
With unified productivity, enterprise social and unified communications tools, financial institutions are able to deliver the type of connected work environment needed to increase employee engagement, making it easier to exploit new business models.

## Meet the evolving needs of modern clients

Meeting the evolving needs of the modern client is critical to maintaining a competitive advantage in the digital age. Microsoft's banker productivity and collaboration solutions help remove silos and drive both greater employee and client engagement across the PC, phone and tablet – transforming the bank into an agile, connected, and client-centered workforce empowered to deliver new value and innovative service offerings.

## Empower employees to improve the business with actionable insight

Bank employees are increasingly asking for self-service tools for exploring data and finding actionable insight. Microsoft's banker productivity solutions empower anyone in your organization to visualize and analyze rich customer, market, and financial data with greater speed, efficiency and understanding. The solutions connect users to a broad range of live data through easy-to-use dashboards, provide interactive reports, and deliver compelling visualizations that bring data to life across devices.



**Microsoft's productivity and collaboration** solutions provide productivity, enterprise social, collaboration, and unified communication tools to enable widely distributed and highly regulated financial institutions to function as agile, innovative organizations—with capabilities that can be accessed across the PC, phone, and tablet.

## Improve efficiency and reduce costs by enabling workplace mobility

Financial institutions need to improve efficiency and reduce costs at a time when mobility and proximity are key business requirements. Microsoft's banker productivity and collaboration solutions help your employees collaborate and make better decisions with real-time information on the device of their choice anytime, anywhere - improving overall productivity and increasing business efficiency.

## Confidently secure your organization, people and information

Microsoft builds security into the banker productivity and collaboration solutions from the start, better protecting your endpoints and delivering faster threat detection and faster response to security breaches. Not only does Microsoft's unique intelligence help protect banks from increasingly sophisticated cyber attacks, but Microsoft also works proactively with law enforcement and industry partners, such as FS-ISAC, to share intelligence proven to help identify and shut down cyber criminals.



# Solution overview

## Banker Productivity and Collaboration

Empower a high-quality, committed workforce that helps deliver new value and connected experiences



### MANAGING DIRECTOR

- Lead a large multifunctional department in a complex organization
- Collaborate with direct reports and their teams
- Network broadly with a diverse set of business partners



### COMPLIANCE OFFICER

- Protect the bank's franchise by ensuring adherence to all policies
- Ensure customer data is highly secure
- Ensure regulatory compliance
- Management reporting



### RELATIONSHIP MANAGER

- Delight clients
- Drive revenues
- Protect the franchise



### INVESTMENT ANALYST

- Insights into financial data
- Complex financial modeling
- Connect with partners and colleagues to make rapid decisions



### PRODUCT MANAGER

- Manage end-to-end product life cycle
- Innovate and develop new products
- Lead projects with IT
- Conduct market research using data analytics and social media



### CUSTOMER SERVICE OFFICER, OPERATIONS

- Delight clients with service excellence
- Collaborate on problem resolution
- Onboard new clients
- Cross-sell more efficiently

# Why Microsoft

Microsoft is empowering banks to deliver higher-value experiences, helping them win back loyalty and thrive in the digital age. This is driven by solutions that enable banks to engage customers across channels, enable a connected and collaborative digital workplace, and transform into a digital business with connected and open systems.

**FSI experience.** The Microsoft advantage is a complete platform developed by a vendor with decades of industry relevant experience. Microsoft's Financial Services solutions are used by more than 1.5M active users, 6 of the top 10 global banks, and over 7,000 financial institutions. Additionally, Microsoft has been selected as a leader for banking-specific technology awards—including Asian Banker, Celent, and CEB Tower Group.

**Cloud commitment.** Microsoft offers an added layer of security and compliance via the Microsoft Financial Services Compliance Program, which gives financial-services customers additional access and insight into Microsoft Cloud infrastructure and solutions.

"The business-critical SharePoint solution helps to provide us with better customer insights and service now that all the client data is at our fingertips."

**Jan Kovar**  
CSOB Project Manager



KBC empowers employees to work from anywhere with Microsoft Office 365, enhancing responsiveness, enabling better decision making, and improving collaboration for virtual teams.



**NEDBANK**

Nedbank gives clients the attention they need from an expert with video banking. The solution reduced wait times and increased the likelihood of clients recommendations by 10%.

"The solution has definitely helped Nedbank gain a competitive advantage, putting us at the forefront of technology and showing that Nedbank is really pioneering and innovative in its use of technology to service and consult clients."

**Stelios Vakis**  
Program Executive of Integrated Channel Strategy

Learn more  
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