



Financial Services

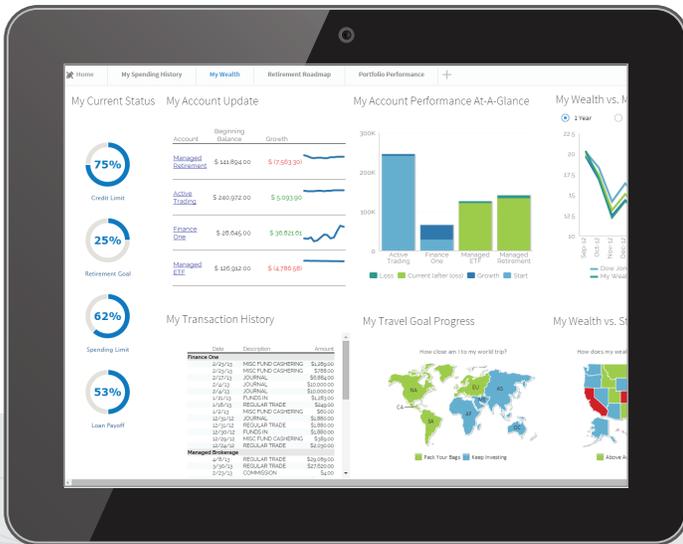
The World Banks on BIRT

We help financial services companies increase revenue and loyalty by improving customer satisfaction. With BIRT, firms deliver a personalized experience where customers enjoy self-service access to their own account data and history, and are proactively provided recommendations and information about additional products and services.

Leading banks, brokerages and wealth management firms know that customer satisfaction creates a competitive advantage. Today that means giving customers secure access to their account data, anytime and anywhere in real time. BIRT provides the ideal embedded analytics solution for financial service firms by enabling seamless integration with existing customer portals via an open architecture delivering secure client access to personalized reports and dashboards on any device. Embedding BIRT to customer facing applications creates a system that customers can't live without, and which they revisit frequently—often daily.

Key Benefits:

- Drive increased revenue via cross sell, by automatically suggesting new products and services to targeted customers
- Engage customers by providing self-service access to personal views of account data on any device
- Increase loyalty by enabling customers to interactively customize how they analyze their financial data
- Realize a more rapid time to market by leveraging BIRT's powerful integration APIs to embed new features in existing customer applications



How Financial Companies Use BIRT



Asset and Wealth Management

Asset and wealth management customers expect timely, accurate and detailed reporting. Firms that deliver personalized information directly into existing systems and on mobile devices can increase revenue and reduce costs because the offers made to customers are highly targeted; this also helps cut call center costs. BIRT helps leading financial services firms:

- Create compelling dashboards with analytics functionality, and deliver those dashboards in a secure, controlled environment
- Display both historical and real-time account information, giving customers a broader understanding of their account activity
- Provide interactivity, including ability to drill down, export, sort and filter data with a click
- Build and deploy customer reporting projects quickly for rapid time-to-market and return on investment

Banking

Online banking is how customers do business today, and banks need ways to differentiate their online services from those of many competitors. By merging relevant, targeted information and embedding analytics into their core online offerings, banks are making it possible for customers to explore other financial directions while they perform their routine tasks. The world's top banks use BIRT to:

- Enrich their online and mobile presence with powerful, interactive customer-driven analytics
- Use customer analytics to offer the most relevant (and profitable) products and services to targeted segments
- Improve cross-sell by leveraging customer patterns and making predictions of customer needs

Securities

Displaying user trading activity is a basic requirement for securities companies. BIRT turns static statements into dynamic, interactive portals that engage individuals and institutional clients. With BIRT, securities firms can:

- Capture daily transaction activities for both customers and brokers, helping them to engage in higher value conversations
- Integrate and display data from multiple sources, including current and historical trading and stock price data
- Empower customers to drill down from portals to underlying transactional data for analysis, without interrupting the user experience
- Retain data for regulatory scrutiny, working with solutions including MarkitEDM for trade processing, Transaction Lifecycle Management systems for reconciliation, and CSC's AWD for workflow management



Customer Satisfaction

"Our customers now have early visibility on issues...and the ability to pinpoint the business units responsible. This enhances their ability to act...with this valuable business information. To us, this is a significant competitive differentiator."

– Global Financial Institution