

The Infor logo consists of the word "infor" in a white, lowercase, sans-serif font, positioned inside a solid red square. A small registered trademark symbol (®) is located at the bottom right corner of the red square.

infor®

The background of the advertisement is a blurred office environment. In the foreground on the right, a woman with her hair in a bun, wearing a blue sleeveless top with white polka dots, is seen in profile, looking towards the left while holding a silver laptop. In the background, several other office workers are seated at desks, some looking towards the camera and others looking away. Large windows on the left side of the office let in bright, natural light, creating a soft, professional atmosphere.

Infor Workforce Management for Financial Services

Optimize every aspect of labor management and productivity

Rely on industry-specific functionality powered on the cloud

Designed to provide an unmatched user experience, Infor Workforce Management (WFM) for Financial Services delivers industry-specific capabilities without extensive customizations or integrations by combining the Infor® cloud platform built on infrastructure services from Amazon Web Services® (AWS®) and Infor OS.

Infor WFM for Financial Services enables banks, financial services organizations, and global corporates with networked analytics so they can:

- Stay current on the latest versions of their software
- Allow users to access applications on any device anywhere
- Reduce total cost of ownership and capital investment
- Integrate cloud and on-premises applications
- Connect data across cloud and legacy applications for enterprise insights
- Democratize analytics for better decisions

Keep applications current and connected, leverage powerful functionality, and optimize critical business processes with Infor WFM.

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Built for the digital workforce

Today's financial services industry organizations need to control labor costs in ways that maintain productivity, customer service levels, and compliance. While it can be a major challenge to strike the perfect balance between these factors, developing a strategy for doing so is imperative when it comes to maximizing labor investment. Companies that take a strategic approach to workforce planning, scheduling, time and attendance, analytics, and reporting will be in a better position to control labor costs without jeopardizing other critical business metrics.

Infor WFM for Financial Services is a leading-edge, comprehensive, and modern solution that strategically enhances workforce planning, execution, and analysis. Infor WFM for Financial Services gives organizations a proven technology platform with deep extensibility, unmatched scale and performance, and industry specialization.

Proven technology

The architecture of Infor WFM for Financial Services supports multifaceted integration and data exchanges. It's designed to help businesses analyze massive data sets with unprecedented speed and performance—promoting better workforce decisions.

Compliance with confidence

With an extensive library of pay rules and work standards that ensure legislative compliance for international, federal, state, and local labor laws, Infor WFM for Financial Services helps mitigate many forms of risk. The solution has documented experience to automate 100% of the pay rules associated with collective bargaining agreements and labor union requirements.

Industry specialization

Infor WFM for Financial Services delivers effective strategy options for all labor management functions, with features designed to suit multiple industries and sub-industries. Vertically specialized modules across banking, financial services, insurance, and capital markets are designed to address industry-specific requirements.

Intelligent mobility

An effective mobile strategy enables executives, managers, and employees to access and act on insights anywhere, anytime. Mobility features from Infor WFM for Financial Services help executives make strategic decisions faster and more easily. For employees, it provides new tools to help self-manage time at work, time off, and professional development.

AI and machine learning

Infor WFM for Financial Services provides digital assistance that accelerates time to completion for repetitive labor tasks, and helps make smarter decisions when human discretion is critical to cost or engagement outcomes. Labor forecasts are optimized using statistically analyzed data trends on multiple levels and environmental factors like weather and climate patterns, along with promotions and other marketing events to provide further accuracy to forecasting.

Workforce planning

Eliminate costs, time, and errors from budgeting and planning processes with annual and periodic forecasting activities integrated with weekly workforce management execution.

Key features include:

Budget creation—Use historical performance, standards, and productivity factors to create a bottom-up labor budget that covers forecasted business demand. Then, align workforce budget results with the top-down budget developed by your finance department.

Budget management—Streamline the solicitation and approval processes for your workforce budget. Set up everything once, use standardized data, and re-use insights to improve efficiency. You can automatically prompt users to participate in the editing workflow and ensure process compliance with dashboards and alerts.

Forecasting—Automate the re-forecasting process to keep your budget aligned with current business performance. Compare current performance against your long-term budget and make changes that are published to the scheduling module.



Workforce scheduling

The Workforce Scheduling module from Infor WFM for Financial Services lets you create shift- or demand-driven schedules while adhering to rules and regulations. Vertically specialized scheduling is designed to meet the unique and evolving requirements of the banking and financial services industry.

Key features include:

- Multi-view robust scheduling including on-call shift splits
- Labor forecast and schedule optimization
- Fair scheduling compliant with union rules, government regulations, and corporate policies
- Central staffing view for managing day of operation with cross-team balancing and staff floating

Diverse scheduling requirements

- Manage the scheduling process—from demand planning, to schedule creation, to day-to-day staffing
- Standardize scheduling practices across an organization while maintaining flexibility for unit-driven staffing processes
- Master rotation schedules that allow for long-term planning and easy management based on pattern-based cyclical schedules, such as maternity leaves or vacations
- Easily find qualified replacement employees when necessary
- Employee billboard for employees to post shifts to find replacements that meet compliance requirements

Complex scheduling requirements

- Develop schedules mathematically, considering all potential variables such as seasonality, employee considerations, and corporate policies that affect the business in real time to consistently create optimized schedules
- Choose from several schedulers to confidently manage schedules, even with a temporary workforce or during fluctuating periods of business peaks and valleys
- Enable managers to modify schedules or fill unexpected gaps as they happen
- Give employees the ability to document availability for shifts and balance their work/life preferences

Time and attendance

With Infor WFM for Financial Services, you can reduce payroll errors and overpayments with real-time collection of labor and time data, as well as automated zero-to-gross pay calculation.

Key features include:

Attendance management

- Maintain employee attendance history
- Automatically and proactively notify an employee's supervisor when attendance violates a configured policy
- Create a seamless data exchange among all workforce management processes which also coordinates with payroll and humanresources processes

Real-time pay categorization

- Capture employee clock-in and clock-out data through hardware, software, or mobile clocking solutions
- Calculate pay based on state and federal laws or collective bargaining agreements
- Use the extensive library of rules and conditions to automate complex pay situations



Workforce performance

Infor WFM for Financial Services offers business intelligence and analytics capabilities that enable companies to act on more diverse sets of data, helping them determine the best workforce strategy while maximizing workforce performance.

Key features include:

- **Management dashboards**—At-a-glance views of workforce performance provide executives with summarized operational views they need to make decisions.
- **Artificial intelligence**—Digital assistant and chatbot services accelerate time to completion for repetitive labor tasks, enabling smarter decision-making when human discretion is critical to cost or engagement outcomes.
- **Machine learning**—Promote the aggregation of larger, higher-quality data with broader labor models, deepen flexibility with forecasting algorithms, and offer correlation services between large data sets.
- **Reporting**—Managers at all levels of the organization can use existing reports to make decisions, perform ad hoc queries, or create customized reports to meet specific needs. A state-of-the-art report writer delivers custom production reports in hours, instead of days or weeks.
- **Configurable alerts**—Create the thresholds, parameters, and specifications for each dashboard per their unique performance objectives. Real-time alerts notify managers when performance thresholds are breached, helping to prevent labor issues like compliance violations, excess overtime, or budget variances.

Take a closer look

Infor OS provides Infor WFM users a comprehensive technology platform of services to choose from, which serve as a unifying foundation for your entire business ecosystem.



Enhanced enterprise experience

Infor WFM for Financial Services centralizes access to applications using single sign-on—providing real-time, organization-wide visibility to streamline communication.



Seamless integration

Integrate Infor and third-party enterprise products in the cloud, on-premises, or in hybrid deployments with Infor's advanced integrated PaaS solution and API gateway.



Transformational data as a service

Provide data acquisition technologies and a unified repository for capturing enterprise data. Infor's data lake ensures data fidelity, governance, security, and access.



Artificial intelligence

Transform historically complex AI technologies (natural language processing, intelligent automation, and machine learning) into valuable and attainable enterprise goals.



Extensibility

Whether it's an intuitive consumer-grade web interface, a high-productivity form, or a business process to replace customizations, Infor's optional developer tools can create the right experience with minimal coding.



Data and system governance

Infor's governance, risk, and compliance (GRC) software can help monitor regulatory and statutory standards and proactively updates critical applications.

World-class infrastructure

The Infor cloud is built on Amazon Web Services (AWS), the market leader for cloud-based infrastructure as a service (IaaS) and platform as a service (PaaS) for over 10 years. By leveraging Amazon's multi-billion-dollar annual R&D investment in technology, Infor's cloud-based and industry CloudSuite™ solutions can better deliver on Infor's core mission of building critical industry capabilities into our applications. Infor has partnered with AWS to deploy Infor CloudSuite solutions in more than 20 AWS regions and 61 availability zones across the globe—and that footprint continues to grow to meet customer requirements. All Infor cloud solutions are designed to run seamlessly across multiple availability zones with active/active high-availability clustering. This means that customers will experience minimal impact from any unplanned outages or system loads.



Extensible and industry-specialized WFM

Infor Workforce Management (WFM) for Financial Services provides a complete set of integrated modules that are built on a digital platform to:

- Deliver demand-driven employee schedules powered by machine learning with a modern, digital user experience
- Present an extensive library of pay rules and work standards to ensure legislative compliance
- Achieve an effective and efficient labor strategy with extensible and industry-rich functionality
- Transform the way data is used to promote collaboration and better workforce decisions

Infor WFM for Financial Services is built for the cloud and fine-tuned for industry specificity, helping companies address every aspect of their labor compliance and performance needs.

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About Infor

Infor builds business software for specific industries in the cloud. With 17,000 employees and over 67,000 customers in more than 170 countries, Infor software is designed for progress. To learn more, please visit www.infor.com.

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