BROCHURE

Infor solutions for financial services

Addressing today's evolving industry challenges

The financial services industry continually faces new sources of disruption and risk. Banks, financial services institutions, and insurance and capital market firms must meet the demand for real-time, data-enabled decisions for better decision support and growth opportunities. They must also improve operational efficiencies like integrating cash and financial management processes into a comprehensive system, while streamlining usage across multiple applications. The right strategy and tools should enable organizations to build greater customer loyalty despite competitive disruptors like non-traditional providers, optimize how people and technology interact to drive better outcomes, and implement measures to protect customer data and remain compliant. To drive greater organizational productivity, industry leaders are partnering with Infor® to innovate and transform in new and unique ways.

Made for financial services organizations

For today's organizations to thrive, their enterprise software must evolve with their users. Infor solutions for financial services are built to specifically help banks, financial services providers, wealth or asset managers, insurance companies, and advisory services providers streamline their operations, improve productivity, and gain deeper insights into business performance.

Infor's industry-based strategy presents a broad application set that drives value across all aspects of a financial services organization. Here are some of our innovative tools, capabilities, and software solutions that are designed for the financial services industry.

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- Financial management

- Human resources

- Revenue management and growth

- Treasury management

- Financial network

Financial management solutions

Whether global or multi-site, modern financial services software must provide integrated financial performance and expense management functionality. Our solutions for financial services help you gain better visibility into the operational and transactional areas that impact your bottom line. Financial management solutions include:

Financials and supply management

Through its innovative approach to structuring and categorizing the financials of business transactions, Infor Financials & Supply Management (FSM) enterprise financial management makes it easy to report and manage from multiple perspectives simultaneously. From operational details, to consolidated entity-wide analysis, to regulatory reporting mandates, Infor FSM does it all—without exposing end users to unnecessary complexity.

Fully integrated supply management provides continuous disciplines to drive spending and cost reductions. The ability to closely track supplies and streamline order processes doesn't just reduce costs. It also eliminates error-prone, time-consuming manual tasks and allows staff to focus on more productive activities, like managing supplier relationships. Infor FSM is a complete source-to-settle solution that gives you full visibility of indirect spend. It also helps you identify opportunities to control spend by increasing compliance and leverage with suppliers.

Expense management

Infor's configurable travel and entertainment expense management solution is easy to maintain, efficient to use, and supports mobile usage and social collaboration. The suite of four integrated applications—Expense Reports, Travel Plans, Payment Requests, and Timesheets—can be used either individually or in any combination to automate expense-related business processes, enforce policy compliance, cut administrative costs, and reduce the risk of accidental errors and intentional fraud.

With Infor software solutions, institutions in financial services, banking, insurance, and capital markets are more informed, proactive, and competitive than ever before.

Performance management

Infor Dynamic Enterprise Performance Management® delivers business and financial performance management applications with support tools that allow organizations to centralize data, build plans tailored to their business, and forecast more accurately. Deep analytics and business intelligence provide a real-time view of performance to unlock siloed data and transform information into actionable insights. The solution combines budgeting, planning, and forecasting, delivering better business modeling and an agile platform for operational planning, workforce budgeting, and sales estimates.

Human resources

Human potential and contribution is essential to an organization's survival. Positioning employees—and as a result, the organization—for success requires taking an integrated strategy that focuses on talent identification, recruitment, and retention, as well as employee engagement and learning management. Our modern human resources (HR) tools help your financial services organization win the loyalty and dedication of your employees (and customers), creating a culture of continuous innovation that others will find difficult to match. Human resources solutions include:

Talent science

Infor Talent Science® is a patented, cloud-based predictive talent analytics solution that helps ensure organizations have the right people in the right positions to achieve business objectives. By leveraging large quantities of behavioral and performance data, this software creates predictive models that are used to better select, develop, and retain top-performing employees across the entire employee lifecycle. Whatever business results an organization wishes to drive—increasing sales, improving customer service, or maximizing calls handled per hour—Talent Science can help. The solution allows managers to select the KPIs that the software should focus on to improve workforce productivity.

Workforce management

Infor Workforce Management is a comprehensive labor optimization, planning, and time and attendance software solution that manages employee resource demand, labor performance, and business analytics. The software can help companies address every aspect of their labor compliance and performance needs with time and attendance, demand-driven scheduling, workforce scheduling, and absence management software tools. Financial services firms can use the solution to mitigate the risk of potential compliance errors and reduce costs, while encouraging employees to focus on activities that generate more value.

Human capital management

Financial services organizations need talent management and HR systems that are ready to run today, while built to adapt as the business evolves and grows. Our human capital managment (HCM) software replaces complex processes, workflows, and systems with sophisticated, yet intuitive technology, empowering HR professionals to deliver streamlined processes and remarkable workforce experiences. Infor HCM solutions provide broad talent and HR optimization capabilities, unique and insightful science-driven tools, and flexible technology to help financial services firms target key business objectives now and in the future.

Revenue management and growth

As the threat of declining revenue and customer loyalty at the hands of more disruptive competition, outdated processes, and other pressures reaches a tipping point, financial services firms must begin to think differently. With Infor's solutions for revenue management and growth, firms can overcome modern challenges and create a clear competitive differentiation to transform their business processes and leverage flexible tools to innovate.

Revenue management and growth solutions include:

Commercial customer billing

The Infor Complete Billing System is a market-leading enterprise pricing and billing application that enables firms to implement a powerful global solution, transform cash and treasury management, respond to emerging priorities, and keep commercial customers happy. With our proven commercial billing solutions, you can transform your bank's enterprise pricing and billing into a powerful system for increasing revenue, controlling risk, forecasting demand, and reducing costs. Implementing these pricing and billing systems can help position firms for future growth and stability.

Customer experience

Today's customers have more ways to research and purchase their products than ever before. To attract and keep them, businesses must create a satisfying, consistent customer experience across all channels. Infor's Customer Experience Suite helps integrate customer data across the enterprise to drive consistent, exceptional, and personal experiences over any channel and across the entire customer lifecycle. The suite delivers the necessary tools to accelerate customer engagement and drive profitability, deliver personalized online experiences with tailored content, marketing messages, and offers aligned with user activity and buying behavior to maximize sales.

Interactive offer management

Interaction Advisor is a real-time solution that uses a combination of historical, demographic, and contextual data to instantly create customer profiles, and then applies an optimum combination of predictive analytics and cross-channel business rules to deliver the highest-impact offers at the moment of interaction.

The right strategy and tools should enable organizations to build greater customer loyalty despite competitive disruptors.

Ensure security and regulatory compliance

Regulatory and insight

Navigating risk in complex business environments requires system-wide visibility, evaluation, and response. Infor helps firms analyze their user roles to proactively detect segregation of duties violations and potential issues in posted transactions and master data. With that support, financial services organizations can uniformly and actively manage multiple types of risk to improve operational effectiveness and efficiency, while confirming compliance with laws, regulations, and relevant industry standards. Our regulatory and insight solutions include:

Risk and compliance

Companies are spending millions of dollars developing and documenting their processes, policies, and controls. Even with this investment, however, many organizations lack visibility into whether this documentation is being cost-effectively monitored and tested. Infor Risk & Compliance automatically identifies exceptions and control breakdowns in key application systems. By locating and correcting issues immediately, financial services firms can reduce risk and help eliminate waste, while also automating compliance obligations to stay current with regulatory requirements.

Regulated cloud

Infor Regulated Industries SaaS (software as a service) was designed to support the most sensitive workloads of highly regulated customers. This solution delivers a flexible and adaptable operations and security model that covers multiple industry compliance requirements. It also offers established security and compliance baseline controls.

Financial network

Infor's financial network solutions help organizations drive digitization at every touch point and at every level along the supply chain, including employee, customer, and operations. By innovating at this enterprise scale, organizations can create a long-term competitive advantage that builds demand and engenders loyalty. Financial network solutions include:

Intraday liquidity

Deliver regulatory compliance configured to comply with the Basel Committee on Banking Supervision (BCBS) agenda and gain the insight to manage intraday liquidity. Realiti® from Infor combines the deep knowledge of the financial industry, intraday experts, and an innovative technical platform in one modern solution that is designed and architected to continually process very high data volumes and still deliver the real-time insight demanded by various user communities within financial services organizations.

Treasury management

Infor Treasury Management is a highly secure, SaaS platform that provides CFOs and treasurers with visibility and reporting necessary to optimize their cash, control bank accounts, manage liquidity, and deliver compliance, as well as standardized, secure, and monitored transmissions to all major global banking partners, multiple routing options to banks, and format transformation for ERP-to-bank connectivity. In addition, the Treasury Management platform's transaction lifecycle management modules enable clients to manage and track debt and investments.

Data science

Infor can make data a usable, shared asset across the enterprise. By providing a comprehensive view of business activity to analysts and decision-makers, we help organizations make new connections, uncover new insights, and improve their responsiveness as events, markets, and needs evolve. Our data science solutions include:

Business intelligence

Infor Birst® is a native cloud business intelligence (BI) and business analytics platform that helps organizations understand and optimize complex processes in less time than traditional BI solutions, connecting the entire organization through a network of interwoven virtualized business intelligence instances on top of a shared analytical fabric. Built with patented automation and machine learning technologies, the Birst "networked BI" approach connects teams and applications across the enterprise via a trusted network of analytics and insights to inform smarter decisions. This unique approach helps leading companies improve profitability, reduce costs, increase revenues, and transform the way they do business—often in 90 days or less.

Data exchange

Infor's goal is to enable digital underwriting. Infor Cloverleaf® Integration Suite software streamlines the exchange of healthcare data to allow insurance companies to improve data integration and business operations. The software allows healthcare organizations to efficiently solve complex interoperability challenges securely and at scale, while using the latest standards (including HL7® FHIR®).

> " We chose Infor Birst because it is cloud enabled, and also because of its roadmap—with embedded BI, vision, and investment. We didn't want to choose the best platform for today if, in two years' time, it is behind the pack."
>
> CHRISTOPHE TCHENG
> VP of Core Products & Platform Architecture, American Express GBT

Innovative approaches

More than 65,000 organizations worldwide rely on Infor to help overcome market disruptions and achieve business-wide digital transformation. Other Infor innovative approaches and solutions include:

Operating service

Infor OS (operating service) seamlessly connects services to provide a robust integration framework and serve as the foundation of an entire business ecosystem. Infor OS brings business processes and artificial intelligence together to enable rapid application development and a common data strategy—all built using service-design principles in a unified experience that allows customers to be flexible and agile in the cloud. Infor's core strategy is rooted in this powerful cloud platform that's designed for creating competitive advantages through innovation.

CloudSuites

Designed to provide an unmatched user experience, Infor CloudSuite solutions deliver industry-specific capabilities without extensive customizations or integrations. Infor CloudSuite solutions combine the Infor cloud platform built on infrastructure services from Amazon Web Services® (AWS®) and Infor OS—enabling cloud applications to work collaboratively with each other and with legacy software. By moving critical business applications to an Infor CloudSuite, businesses can take advantage of automatic upgrades that deliver the latest advances in enterprise functionality. As users become more productive, technology teams can spend less time managing software deployments and customizations—and everyone can focus on more strategic initiatives.

Mobility

Infor mobile technology is no different from using mobile in our daily lives. Because our applications can be used across multiple devices, the key to using our technologies is understanding the options available: which application to use, how to set up applications, and how to scale applications by using the required features that support your business.

Services

Infor provides a set of tools to help manage the migration process. Implementation accelerators are preconfigured solutions based on the latest version of Infor application suites. They are designed to deliver certain core industry application processes, along with reduced implementation times, risks and costs, both in the cloud or on-premises, for customers in specific industries. Each Implementation Accelerator project plan is developed by Infor Consulting Services (ICS). ICS employs a proprietary process known as the Infor Deployment Method which is designed to provide a unified approach to the delivery of specific services projects by utilizing a prescriptive, repeatable process for migrating our existing customers that can help drive predictable results while helping to lower risk and reduce overall costs.

Insight and innovation designed for financial services

During a time of evolving challenges and complexity, Infor is committed to serving the financial services industry and supporting holistic transformation. Modern disruptions are creating new risks right now—and potentially in the future. It's not enough to merely upgrade some key applications internally, without delivering integrated value to your customers. To innovate, today's financial services organizations require deeper insight and more sophisticated technology.

At Infor, we surround you with everything you need to be successful. With more than 5,000 product, technical, implementation, and industry experts that support customers in 170 countries, our goal is to ensure your success with any new countries, markets, industries, or strategies you wish to pursue. Your success is our success.

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