

Information Builders' WebFOCUS business intelligence and iWay Software integration technologies provide an end-to-end information management strategy, combining performance management, data governance, business intelligence, and analytics to help organizations make smarter decisions.

Performance Management for Financial Services Firms



Today's financial institutions face shrinking customer loyalty, intensifying competition, increasing regulatory requirements, and decreasing profits. As these challenges continue to multiply, banks, brokerages, lenders, and other financial services providers must find ways to better manage performance across the enterprise.

With a comprehensive performance management strategy and powerful tools to support it, every financial services organization can begin to improve all facets of their operations – from product development and risk management through customer service and branch operations. Only with the right performance management solution can financial services firms tap into data from across all product lines and service channels, and leverage it to set critical objectives, communicate plans and goals with stakeholders at all levels of the organization, and measure and manage progress.

The WebFOCUS Performance Management Framework (PMF) from Information Builders provides a comprehensive, full-featured platform for enterprise-wide performance monitoring and enhancement. Everyone (executives, branch managers, call center representatives, and even customers) is empowered with all the tools they need to actively participate in the performance management process.

Today's financial services firms gather and store a tremendous amount of data. Applications for customers, transactions, accounts, demographics, promotions, and other business functions contain vital intelligence about operational performance that is often

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unleveraged. With a robust performance management solution in place, these organizations can create a culture of visibility and accountability across the entire spectrum of account/portfolio management, risk management, branch management, customer service, and other core activities. It allows them to gain a competitive advantage, increase efficiency, improve customer retention, and boost profitability by optimizing performance company-wide.

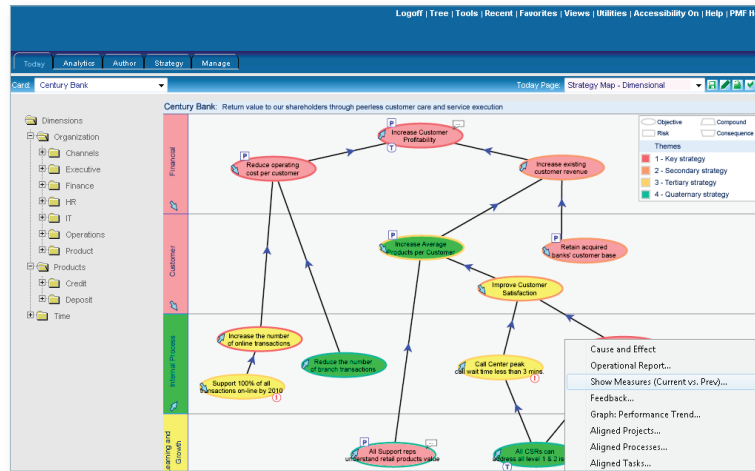


Improve Risk Management

Financial organizations are faced with many different types of risk. Yet, at many institutions, the management and mitigation of these risks are not properly balanced with, and tied directly to, the achievement of performance objectives. With the right performance management tools in place, financial firms can gain insight into how such threats as improper lending practices and market volatility affect the state of their business, and take appropriate action to prevent these risks from impacting performance.

Increase Profitability

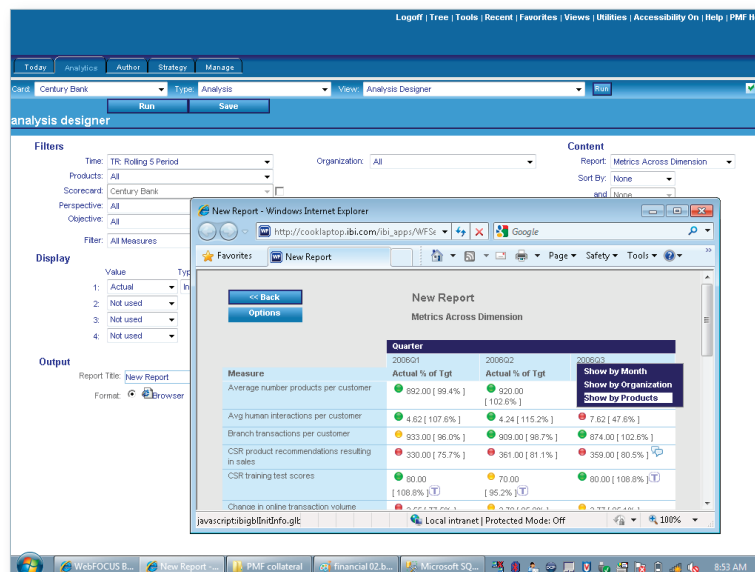
Banks and brokerage firms of all sizes, and their bottom lines, have been hit hard by the global financial crisis. By tracking key revenue metrics by product line, region, branch, channel, or even by individual sales agent or customer, banks put more effective plans in place to achieve growth targets and preserve profit margins.



Boost Operational Efficiency

As profit margins diminish, banks must reduce overhead costs to survive. This requires them to increase productivity in all key functions and activities across their business. Performance management enables financial institutions to define operational strategies, link them to functional goals, and measure results to ensure ongoing progress.

Setting performance goals and closely monitoring their achievement for all those who interact with account holders each day can help improve loyalty by ensuring that customers receive superior service at every touch point.



Find Out More

To find out how our solutions can help your company succeed, talk to an Information Builders representative today. Contact your local Information Builders office, visit us at **informationbuilders.com**, or in the U.S. and Canada, call **(800) 969-4636**.

Enhance Customer Relationships

Improving customer acquisition and retention is a pressing need for today's financial services providers. Setting performance goals and closely monitoring their achievement for all those who interact with account holders each day – from call center teams to branch personnel – can help improve loyalty by ensuring that customers receive superior service at every touch point.

WebFOCUS Performance Management Framework

WebFOCUS PMF is a complete, cutting-edge, best-of-breed platform that enables holistic and pervasive operational performance management across an entire business. A comprehensive, fully integrated, out-of-the-box solution, PMF offers a host of powerful tools, including:

- Personalized end-user dashboards
- Metric blogging
- Print-quality publishing
- Mobile alerts
- In-depth analytical capabilities

PMF empowers financial services firms to create a true culture of visibility, accountability, and performance enhancement.

PMF is flexible and designed to support any existing performance management methodology, such as Six Sigma, Total Quality Management (TQM), or balanced scorecard (BSC). It comes complete with all the functionality and tools financial services companies need to efficiently and effectively set strategies, communicate those plans throughout the organization, define related metrics, and involve all stakeholders in monitoring and measurement – all from a single, intuitive, easy-to-access, browser-based environment.