



Reducing Churn and Increasing Profitability

Organizations in the financial services sector have been quick to recognize the potential of web self-service to increase the productivity of employees, improve collaboration with business partners and enhance service and support to customers.

According to a recent study by the Pew Institute, online banking is the fastest growing Internet activity, with 13 million Americans using a banking site on a typical day. Online trading has become the preferred channel for a growing number of investors who appreciate the ease, cost savings and value-added services associated with web self-service. Insurance companies are using the web to provide personalized information linked to needs at different life stages and to reduce call center service and support costs.

With the growth of Internet technologies, consumers are no longer tied to local financial institutions. To survive and grow, organizations need an effective multi-channel strategy.

Over 60 leading financial services companies, including Bear Stearns, BNP Paribas, BPU Banca, Citigroup, Lloyds TSB and Northern Trust rely on BroadVision self-service web applications to power and personalize their e-business initiatives.

Solution Snapshot

- Unified portal framework serving employees, partners and customers
- Multi-channel commerce framework—B2B2C
- Integrated content services
- Scalable and secure
- Single sign-on
- Browser-based with point and click simplicity
- Wireless PDA capabilities
- Open standards
- Rapid deployment (3-6 months)
- Agility to add new processes
- Online collaboration

Personalized Self-Service

By providing a personalized self-service environment, customers, partners and employees can serve themselves without resorting to more expensive channels for service and support. Personalization also allows for promotions based on needs at different life stages including college expenses and retirement planning. Alerts and bookmarks simplify access to relevant and important information.

Legacy System Integration

Providing realtime access to financial records requires secure and seamless access to information in legacy systems. BroadVision has a decade of experience providing legacy integration to organizations in the financial services sector. BroadVision's portal solution provides unified access to data throughout the enterprise.

Collaboration

User-managed microsites, available out-of-the-box, provide a shared workspace that enables colleagues across the organization to collaborate on a specific project, activity or common interest. Membership in microsite communities can span the organization and include external users (contractors, suppliers, clients, design partners).

Mobility

BroadVision supports alternate information delivery devices such as pagers, cell phones, fax machines or personal digital assistants using XML and WAP standards. Employees and others can receive alerts or access their personalized gateways from their handheld devices from anywhere in the world, anytime.

Secure and Scalable

BroadVision applications are proven in high traffic environments including Citigroup, BNP Paribas and Lloyds TSB. Security capabilities include user authentication, role-based entitlements, and distributed publishing and administration to ensure the integrity and protection of the information environment.

Simplified Site Maintenance

Non-technical users can publish content, run reports and execute marketing campaigns without IT support, reducing bottlenecks and overall support costs.



Agility

BroadVision's agile portal framework enables organizations to rapidly design and deploy new online processes to extend the functionality of your portal and keep pace with changing business requirements.

CUSTOMER SNAPSHOTS

Lloyds TSB

Lloyds TSB, a leading financial services group based in the United Kingdom, chose BroadVision applications to launch its portal for small-business banking customers. The site furnishes customers with online services and self-service access to information. The site includes industry and legal information, plus an online directory of businesses and key information on regulations.

The site customizes information and services for individual businesses based on their life stage, including businesses that are just starting out, those aiming for expansion or growth, businesses that want to simplify day-to-day operations, and those looking for help in moving to the next level. Lloyds TSB selected BroadVision because of its strong collaboration features and the short time to market needed to deliver a fully transactional site. A suite of BroadVision e-business applications and tools provided Lloyds TSB with a robust and scalable solution that easily integrated with its back-office systems.

“We are helping small businesses to benefit from the best the Internet provides. To do this, the services have to be relevant to each business banking customer. BroadVision's contribution allows us to dynamically create content and provide solutions that benefit the individual company as well as the whole business community.”

— Jeremy Hayward, Portal Director, Success4Business.com, Lloyds TSB

BPU Banca

“By standardizing on BroadVision for all our portal initiatives, we have retained group autonomy while reducing IT support costs and simplifying policy compliance.”

— Carlo Assi, Internet Banking Manager, BPU Banca

Citibank.com

Citibank.com was named **Best of the Web** by Forbes.com and **#1 for Personal Online Banking** site by Gomez two years in a row.

“Citibank is the most intelligent banking site around. Its design is simple but robust and its functionality is top notch.”

— Forbes.com

Bear Stearns

Bear Stearns, a leading global investment banking, securities trading and brokerage firm, is using BroadVision Portal to power the company's public website (www.bearstearns.com) and a portal initiative in their Global Clearing Services division to provide clients with personalized, self-service access to a wide range of clearing, operational and administrative services.

“BroadVision has a proven track record for operating well in a complex software environment and for delivering rapid time-to-value. Their standards-based approach and compliance features give us the flexibility we need while eliminating the development effort.”

— Duncan Rawls, Senior Managing Director in Information Technology, Bear Stearns

BNP Paribas

BNP Paribas is one of Europe's leading banks and a major player in the European fund market. The company is using BroadVision software to unify a wide range of portal initiatives and to move more business processes to web self-service.

“We have been using BroadVision for many years and have always counted on them to help us and guide us in creating value-added offerings.”

— Eric Lascension, Director of IT for Distribution and International
BNP Paribas Asset Management

BroadVision is a global provider of web self-service solutions. Our agile commerce and portal applications enable customers to quickly create and adapt online processes to keep pace with changing business requirements. Over 1,000 organizations—including Circuit City, Yankee Candle, Vodafone, Cardinal Health, Hewlett-Packard, Toyota, Japan Airlines and the U.S. Air Force—serving nearly 60 million registered users, rely on BroadVision's open solutions to power and personalize their mission-critical web initiatives.

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