

# Infor Financial Services Essentials



➔ Infor is providing more than 3,000 financial services companies worldwide with the solutions to strengthen their financial operations, achieve new levels of customer service, and meet regulatory requirements.

## Do business better.

Customer service. Cost efficiency. Compliance. These three business drivers continue to define the financial services industry, just as they have for decades. But today the challenges are tougher. Escalating competition requires you to find new ways to serve customers across multiple channels. Regulatory compliance is more complex, particularly in the global environment. At the same time, CFOs and marketing VPs in financial services companies are expected to perform at a more strategic level, beyond the traditional financial and brand awareness role to full-fledged corporate financial management (CFM) and financial accountability to corporate marketing strategy. Isn't it time you found an information technology partner with integrated solutions built to address all of these challenges? That partner is Infor™.

INFOR™

### Leverage experience.

As a leading provider of solutions for the financial services industry, Infor has a critical understanding of your competitive requirements, gained through more than 25 years of successful business and software implementation experience.

This experience is built in to Infor Financial Services Essentials, helping you close the disconnect between the way your existing IT systems perform and the way you must do business today. By providing integrated solutions that support customer service, cost efficiency, and compliance, we help you:

- Integrate front- and back-office processes.
- Improve visibility across the enterprise.
- Unite customer and trading partner data with financial systems.
- Grow the CFO's role from transaction processing to CFM.
- Attract and retain a qualified workforce.
- Synchronize marketing across inbound and outbound channels.
- Maximize customer relationships to increase revenues.
- Meet global regulatory requirements.
- Get the most from your existing technology investment.

### Get business specific.

Demands on CFOs and marketing VPs in financial services organizations have never been as great as they are today—or the stakes as high. Infor Financial Services Essentials is a direct response to those challenges—a comprehensive, modular, and integrated suite of solutions that supports global operations, are easy to use, provide visibility of information for decision makers, and deliver a low total cost of ownership.

#### Extended financial management

Most important, our solutions support CFM initiatives in the most forward-thinking companies. At the heart of Infor Financial Services Essentials is Infor FMS, a financial management solution that combines flexible transaction processing and other core applications with the real-time reporting, analysis, and planning capabilities necessary to guide forward thinking companies today. It can help you:

- *Strengthen your financial performance.* Infor FMS solutions enable companies to integrate and streamline local and multinational financial management processes from end to end. By doing so, you achieve a reliable, apples-to-apples view of financial performance across the entire enterprise, as well as the flexibility and control necessary for adapting to the demands of even the most challenging business environment.
- *Integrate financial and operational data.* While many financial organizations struggle to consolidate data, Infor FMS can integrate financial planning and operational data to provide consistent and accurate reporting across the business. You also reduce errors through a single, integrated environment. Transactions can be posted once instead of several times in multiple systems.
- *Establish a consistent and auditable environment.* Given the growing requirements for regulatory compliance, the deployment of a single, integrated system provides stronger financial controls and greater visibility into underlying processes, data, and trends. Infor FMS provides a solid platform for enforcing global financial standards and processes. Whether it's Sarbanes-Oxley, Basel II, International Financial Reporting Standards (IFRS), the EU's Modernisation Directive, or the UK's Operating and Financial Review (OFR)—Infor FMS has the reporting functionality to meet all of their requirements.



- *Sharpen your focus on performance.* Our financial performance management capabilities help shift the focus of the finance organization from transaction processing to decision support. Our solutions provide rich, easy-to-understand reports on key performance indicators (KPIs) in the processes involved in budgeting, forecasting, planning, and consolidation. The result is actionable business insight for reducing the cost of service and improving overall business performance.
- *Gain flexibility and agility.* Infor FMS provides the flexibility to change as your business changes. Supported by Infor Open SOA, a service-oriented architecture that accommodates constant but unavoidable changes in business practices, Infor FMS allows you to turn change into opportunity. You're never locked into existing releases that are difficult to upgrade or that limit the strategic contribution CFOs can make to enterprise performance.
- *Extend and elevate financial management.* Through Infor FMS, finance can extend its reach to encompass areas such as marketing, customer service, performance management, and human capital management. You also can become more predictive—providing actionable insight into key business opportunities. In this way, finance helps set plans and budgets that are truly reflective of strategic priorities.

#### **Integrated Human Capital Management**

To help you find and keep the best people, Infor offers tools for turning human resources into a competitive advantage. Infor HCM solutions provide support for attracting and retaining a qualified workforce, accessing and sharing vital workforce information safely and securely, adapting workflow processes as your company grows and changes, and enabling effective decision-making relative to the performance of your people.

#### **Integrated Customer Relationship Management**

Infor Financial Services Essentials includes an integrated CRM solution that was designed with today's financial services companies in mind. With integrated marketing, sales, and service capabilities, our solution delivers up-to-the-minute, event-driven intelligence to every interaction you have with customers.

Infor CRM for Financial Services optimizes customer interactions across all touch points: branches, contact centers, direct-marketing channels including direct mail and email, and self-service systems including web, automated

“ Infor's flexibility and multi-currency functionality are among the features that are fundamental to our commitment to provide long-term value and financial security to our policyholders. ”

JIMMY WONG, VP FINANCE, MASSMUTUAL ASIA

teller machine (ATM), interactive voice response (IVR), and mobile devices. Plus, our solution works seamlessly with existing front- and back-end systems, so you can leverage your technology and infrastructure investments. You'll:

- *Realize organic growth potential.* Maximize the full potential of existing customer relationships to increase revenues. Real-time data about your customers lets you anticipate needs and capitalize on spending trends.
- *Personalize interactions and offers.* Our solution reduces churn by recommending the optimal retention offer for each customer, matching the value of the offer to the value the customer brings to your organization. It also highlights customer credit scores and other attributes, so you can continually design offers best suited for each customer.
- *Protect existing technology investments.* By coexisting with your current IT infrastructure and plugging into existing branch, contact center, and self-service systems, our solution leverages your existing technology, enabling rapid implementation for rapid results.

#### **Integrated Enterprise Asset Management**

Integrated EAM solutions help financial services companies optimize asset performance. We know what an impact any downtime can have on your company. Our solutions help you forecast likely failure points and their causes to keep your operations running smoothly.

#### **Integrated Performance Management**

Integrated PM solutions make it possible to align strategic objectives with operational budgets and activities for improved business performance and risk management. We provide the secure and seamless information analysis you need to track key business metrics, monitor the health of your organization, and make fast, informed decisions.

### See results now.

Infor Financial Services Essentials can be implemented quickly with no delay to your business, so you don't have to wait for a return on your investment. Packaged with smart functionality to address the key challenges you face today, our solutions require less customization, shorter implementation times, and fewer IT resources to maintain. So in addition to fast ROI, you get a lower total cost of ownership over the long term.

And they are relevant. Our customers appreciate the fact that our solutions enable them to focus on profitable activities like never before. Reports are rich with the right information and are easy to understand—again, a result of our understanding of what you need to run your business.

Our customers also like the geographic spread we are able to offer, meaning we can get you up and running quickly—your business subsidiaries, too—no matter where the location. We are unique in our global reach, providing a combination of global functionality and local support that is unmatched by other business software providers. But it is more than location that our customers like about us. They also appreciate our knowledge of the issues involved in implementing systems in global companies. It's just another reason Infor is the ideal partner for financial services companies today.

### About Infor.

Infor acquires and develops functionally rich software backed by thousands of domain experts and then makes it better through continuous innovation, faster implementation options, global enablement, and flexible buying options. In a few short years, Infor has become one of the largest providers of business software in the world. For additional information, visit [www.infor.com](http://www.infor.com).

**Infor Corporate Headquarters**  
13560 Morris Road  
Suite 4100  
Alpharetta, Georgia 30004  
USA  
Direct: +1 (800) 260 2640

Contact your local Infor office regarding availability of products in your region

**INFOR™**