



infor



# Infor solutions for the financial services industry

Delivering productivity and competitive edge for financial services firms

# Innovative tools and strategies for the financial services industry

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.

With the right strategy and tools, organizations will be able 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.

That's why so many industry leaders are now innovating and transforming in unique ways by partnering with Infor®.

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# Foundations for growth

To evolve as a financial services organization, leaders should consider the necessary foundations for success across business models, customers, and technology.



## Business model

- Leveraging artificial intelligence
- Collaborative and reimaged services models
- Workflows and automation
- Analytics for accelerated finance and business decisions



## Customers

- Dashboards and insights
- Centralized customer data
- Unique, personal experiences
- Omni-channel campaigns
- Campaign compliance
- Real-time offers



## Technology

- Security
- Digital platform
- Workflow execution
- Collaboration
- Data science

# Top challenges facing today's finance organizations\*

Total reliance  
on data

Increasingly  
complex  
technology  
ecosystem

Asked to  
“Do more and  
do better”

Premium on talent

\*Source: Gartner, **Top Priorities for Finance Leaders in 2021**, Jan 13, 2021.



# See results with Infor<sup>\*\*</sup>



## Achieve more, with better results

- **50%** reduction in time to close
- **40%** reduction in budget processing
- **75%** less time spent performing reconciliations
- **60%** faster in producing financial reports



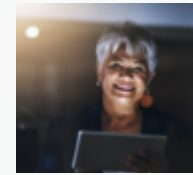
## Simplify your tech ecosystem

- **55%** reduction in integrations and customizations
- **32%** reduction in maintenance, development, and compliance costs
- Consolidate your global financial operations into a single platform



## Make data usable

- **80%** reduction in manual reporting
- **15%** increase in time to decision
- **50%** reduction in BI FTEs required for operational and financial reporting



## Find, develop, and retain talent

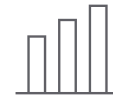
- Reduce the need to rely on aging talent to maintain outdated systems
- Outsource your ERP innovation to Infor for continuous improvement delivered constantly

\*\*Quantified benefits in this chart are estimates based on Infor Value Engineering assessments of customer experiences and Infor Financials & Supply Management product adoptions that include 193 total customers (175 on the multi-tenant platform) as of June 2021.

# Infor in financial services

Infor's industry-based strategy presents a broad application set that drives value across all aspects of your financial services organization. These applications improve key functional areas, including:

- Global ERP financials
- Intraday liquidity monitoring
- Commercial bank pricing and billing
- Treasury management
- Human capital management
- Workforce management
- Talent science
- Analytics, BI, and data science
- Customer experience
- Risk and compliance



## Retail and commercial banking

Deep domain experience with intraday liquidity management and relationship pricing and billing, powered by a global GL ERP platform.



## Insurance

Improved digital underwriting and mission-critical capabilities for cash and liquidity management, payments, and working capital optimization.



## Credit services

Omni-channel offer management to your customers and call center, as well as robust analytics.



## Investment management

Detailed accounting for your complex trade, as well as insight into your liquidity position.



## Capital markets

Detailed accounting, business intelligence, and analytic reporting for your equity, trading, and lending services, and rich data-science driven dashboards.

# Drivers for financial services

For today's organizations to thrive, your enterprise software must evolve with your 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.



## Finance and procurement process

- Meet the demand for real-time, data-enabled decisions
- Use continuous disciplines that drive spending and cost reduction
- Remain compliant with changing rules and regulations



## Treasury

- Improve intraday liquidity monitoring
- Implement a treasury management system
- Sharpen commercial bank pricing and billing



## Customer experience

- Align strategy with evolving customer expectations
- Offer innovative products and services
- Provide centralized customer data



## Workforce

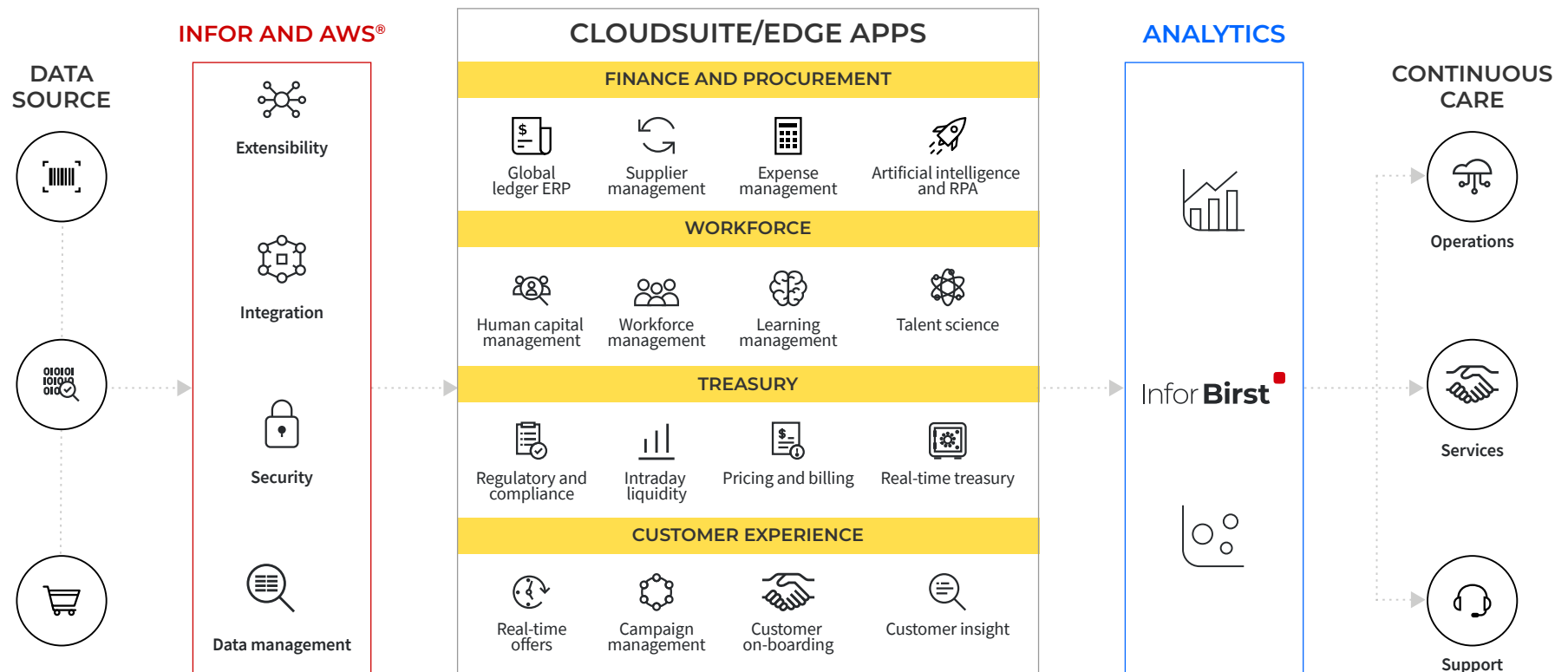
- Develop and equip the workforce with new digital skills
- Optimize how people and technology interact
- Foster employee collaboration



# An operations platform for success

Infor's CloudSuite™ Corporate core and edge applications add value to organizations in the key areas of finance and procurement, workforce management, treasury, and customer experience. Additionally, Infor OS technologies and pervasive analytics provide a digital operations platform for financial services.

## Digital operations platform for financial services



# Innovative tools for financial services

## Financial management

### Financial management

Financial management solutions, whether global or multi-site, must provide integrated financial performance and expense management functionality. Infor Financials & Supply Management and Infor SunSystems® both offer flexible infrastructure and functionality.

[Learn more ›](#)

### Expense management

Infor Expense Management is a flexible and configurable travel and entertainment expense management solution. It's easy to maintain, efficient to use, and supports mobile usage and social collaboration. Eliminate manual processes, while managing employee-initiated expenses on the go. [Learn more ›](#)

### Performance management

Infor Enterprise Performance Management® (Infor EPM®) delivers business and financial performance management applications with support tools that allow you to centralize your data, build plans tailored to your business, and forecast more accurately. [Learn more ›](#)

## Human resources

### Talent science

Infor Talent Science® is a patented, cloud-based predictive talent analytics solution that helps ensure you have the right people in the right positions to achieve your business objectives. By leveraging large quantities of behavioral and performance data, Talent Science can create predictive models. [Learn more ›](#)

### Workforce management

Infor Workforce Management is a comprehensive solution that aligns labor management with corporate strategy. Integrated modules address forecasting and budgeting, scheduling, time and attendance, performance management, and compliance, streamlining processes to increase efficiency. [Learn more ›](#)

### Human capital management

Your talent management and HR systems must be strong enough to meet your workforce needs today, as well as innovative and flexible enough to adapt as your business evolves and grows. Infor Human Resources software empowers organizational leaders with critical tools for optimization. [Learn more ›](#)

## Revenue management and growth

### Commercial customer billing

Your bank needs tools to elevate pricing, billing, and the analysis of fee-based and payments-related products and services. The Infor Complete Billing System is a market-leading enterprise pricing and billing application with a strong user experience, integrated enterprise business intelligence, and analytics. [Learn more ›](#)

### Customer experience

Deliver personalized online experiences with tailored content, marketing messages, and offers aligned with user activity and buying behavior to maximize sales. The Infor Customer Experience Suite gives you the tools to accelerate customer engagement and drive profitability. [Learn more ›](#)

### Interactive offer management

Infor 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. [Learn more ›](#)

## Financial network

### Intraday liquidity

Deliver regulatory compliance configured to comply with the BCBS agenda and gain the insight to manage intraday liquidity. With Realiti® from Infor, you get comprehensive coverage across your bank's entire operations, including all settlement accounts across the globe. It means greater insight. [Learn more ›](#)

### Treasury management

Infor Treasury Management is a highly secure, software-as-a-service (SaaS) platform. This comprehensive product suite is designed to help companies tackle many of today's most complex financial challenges by empowering forward-thinking teams to optimize key capabilities for cash and risk management, payments, and working capital strategies. [Learn more ›](#)

## Regulatory and insight

### Risk and compliance

Navigating risk in complex business environments requires system-wide visibility, evaluation, and response. Infor Risk & Compliance helps private and public sector organizations monitor and analyze transactional and master data, as well as user access and application security data. [Learn more ›](#)

### Regulated cloud

Infor Regulated Industries SaaS 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. [Learn more ›](#)

## Data science

### Business intelligence

By connecting the entire organization through a network of interwoven virtualized business intelligence instances on top of a shared analytical fabric, Infor Birst® delivers the speed, self-service, and agility front-line business workers demand, with the scale, security, and control to meet rigorous corporate data standards. This is provided with a low total cost of ownership via cloud configurations. [Learn more ›](#)

### Data exchange

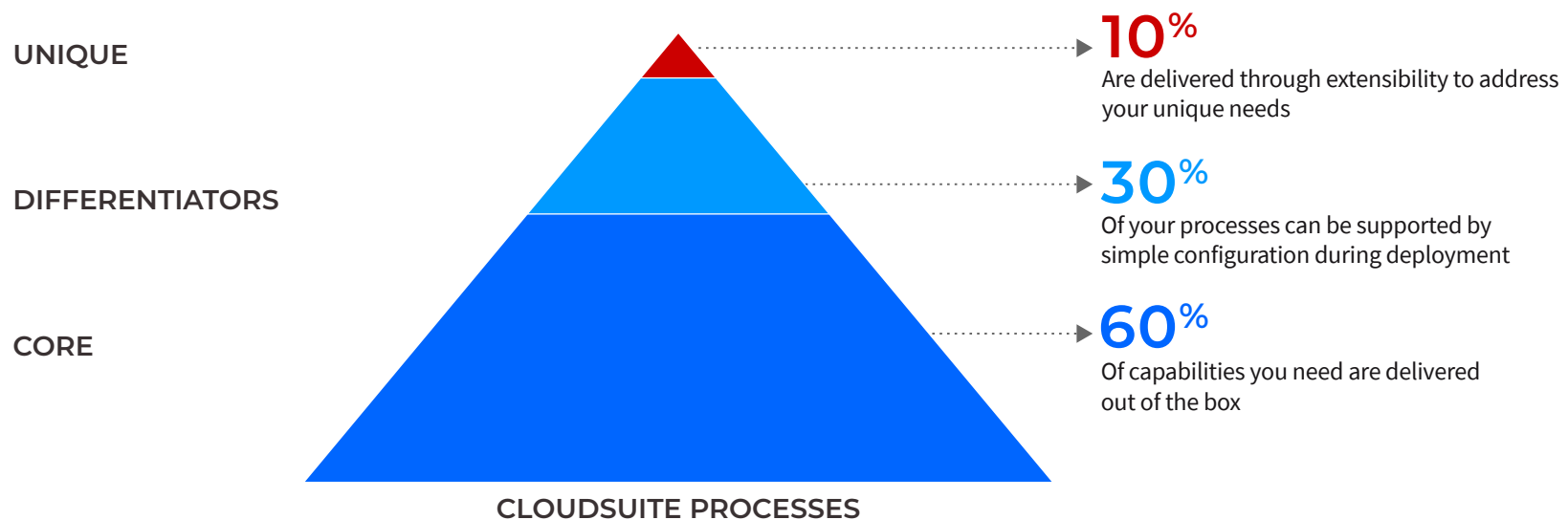
Infor's goal is to enable digital underwriting. Infor Cloverleaf® Integration Suite software streamlines the exchange of healthcare data to allow insurance companies to improve data integration and business operations. The software allows healthcare organizations to efficiently solve complex interoperability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

# Deployment services

Getting technology systems up and running quickly, as well as achieving a standard, upgradeable, and easily supported deployment are the keys to achieving a fast and reliable return on an investment. From provisioning and system implementation to performance management and tuning, Infor Services' deployment experts draw on decades of experience to help you achieve standardized implementations that incorporate best practices and result in a lower cost of ownership.

- Deploy quickly and reliably, anywhere in the world
- Accelerate time to value and minimize risk
- Achieve a cost-effective, easily supported deployment
- Maximize the long-term value of your investment

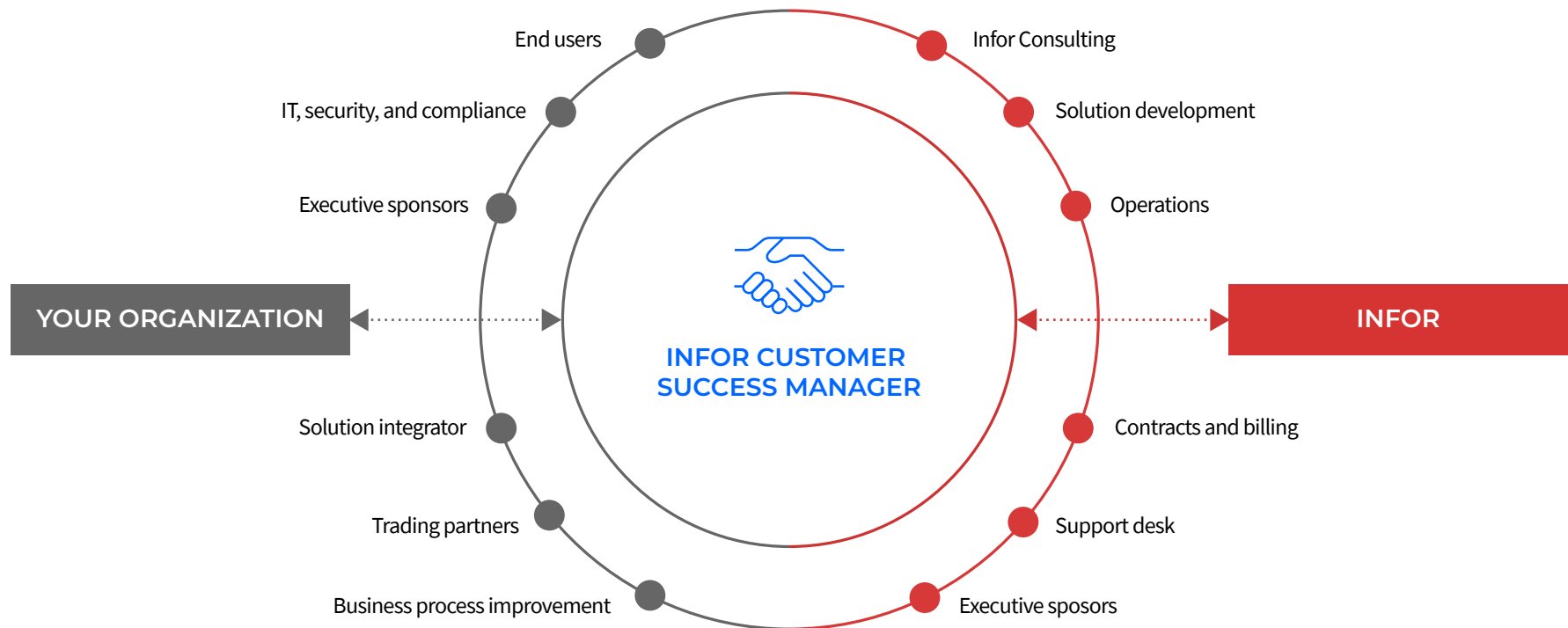
## We don't believe in "one-size-fits-all" business software



# Delivering customer success

At Infor, we surround you with everything you need to be successful. With over 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.

## Investing in your success



# Case studies

## American Express GBT

Using Infor Birst, **American Express Global Business Travel** allows customers to manage spend through peer-to-peer benchmarking, travel cost optimization, and understanding employee travel behavior while using alerts and red-flags on out-of-policy activities to maximize savings.



GLOBAL BUSINESS TRAVEL

## Manulife

**Manulife Financial** increased accounting efficiency, improved decision support with one version of the truth, and positioned the company for growth with major acquisitions and organization changes with Infor CloudSuite Corporate and Infor Treasury.



Manulife

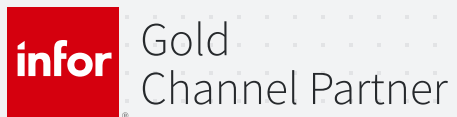


# Discover Infor solutions for the financial services industry

During a time of evolving challenges and complexity, Infor's financial services solutions are designed to support your finance, marketing, sales, core operations, product management, revenue management, human resources, and IT teams with innovative and modern tools and services that are built for the cloud and can be augmented with artificial intelligence.

LEARN MORE ↗





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#### About Infor

Infor is a global leader in business cloud software specialized by industry. Over 65,000 organizations in more than 175 countries rely on Infor's 17,000 employees to help achieve their business goals. Visit [www.infor.com](http://www.infor.com).

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INF-2967465-en-US-1123-1