

MICROSOFT® FINANCIAL SERVICES

ADVISORY SERVICES

Advisory Services empowers better customer service through an integrated platform that provides a complete view of the customer, automated business processes, and a collaborative environment that reduces administrative time.

Specific solutions include:

- Wealth management
- Insurance
- Capital Markets

“TowerGroup believes customer retention requires aggregated customer knowledge to be available at the point of decision so workers and distributors can deliver personalized service based on customers’ needs and preferences.”

KAREN PAULI
Research Director
Insurance Practice,
TowerGroup

MICROSOFT ADVISORY SERVICES SOLUTIONS provide a powerful, integrated platform that empowers financial services professionals with the ability to offer better customer service to individual and institutional clients.

The challenges in the wealth management, insurance, and capital markets environment are numerous – from increasing customer expectations to the expanding range of financial instruments and policies, the pressures of industry consolidation, lower margins, and increased regulatory requirements. A key to success in this competitive, fast-paced sector is having a holistic view of the client relationship with access to information across service delivery channels and lines of business. Even more important, however, is having the right technology in place so client facing professionals can spend less time on administrative tasks and more valuable time serving clients.

Advisory Services targets professionals who provide advice, sales, and services to individual and institutional clients. Advisory Services uses a structured approach to **bring together disparate information**, both internally and externally, to provide financial advisors with **real-time, integrated, multi-channel access to client information, research, and data**. The Advisory Services dashboard empowers financial services professionals to truly become trusted advisors to their customers. Specific solutions include:

- **Advisory Services – Wealth Management** is Microsoft’s solution for financial advisors in Banking, Insurance and Capital Markets industries. This integrated framework drives improved productivity for professionals providing financial advice to individual clients. Wealth Management solutions significantly increase productivity through 360 degree portals, providing comprehensive visualization of client data with workflow capabilities promoting advisors differentiation through superior customer service.
- **Advisory Services – Insurance** supports agents and brokers representing Life, Annuity and Property & Casualty lines. This solution area includes the agent portal and broker portal which enables efficiencies in the distribution network and services that connect carrier agents to price quoting, underwriting, and other policy origination and management systems. This framework is designed to track and report premium production, customer service and retention, and other agency key performance indicators.
- **Advisory Services – Capital Markets (Institutional)** is designed for sell-side firms serving institutional clients using Customer Relationship Management (CRM) and client analytics to provide greater visibility into client activity across financial product silos. This solution enables firms to provide improved client service by seamlessly integrating the entire communication infrastructure including Instant Messaging (IM), Voice Over Internet Protocol (VOIP), analytics tools and real time communications with portfolio managers and traders leveraging turret systems.



DRIVING CONNECTED EXPERIENCES

BANKING

CAPITAL MARKETS

INSURANCE

Key Technologies

The following key Microsoft technologies form the foundation of Advisory Services solutions. Other technologies may also be employed to enhance financial institutions' advisory services strategies.

- Microsoft Dynamics CRM
- Office System
- SQL Server
- Office SharePoint Server
- System Center
- Windows Server

“AdviceAmerica is providing advisor solutions that enable financial advisors to more effectively attract, manage, and retain client relationships. Tightly integrating with Microsoft software, AdviceAmerica provides seamless applications that help financial advisors to streamline their business processes, collaborate more easily with other advisors, and enhance their ability to provide superior client service at minimal cost.”

PURNA PAREEK
Chief Information Officer
AdviceAmerica

Customer References:

Allianz Belgium Case Study: Allianz Belgium Boosts Distribution Relationship Management of Brokers using Microsoft Dynamics CRM

Endsleigh Insurance Case Study: Microsoft Customer Relationship System Helps Insurance Firm Boost Single Product Sales Tenfold

Raymond James Financial Case Study: Global Financial Services Firm Improves Customer Service with Ease-of-Use Solution

About Microsoft® Financial Services

Microsoft Financial Services helps Banking, Capital Markets and Insurance firms solve the challenges of today by turning data into insight, reducing costs through collaboration, transforming ideas into action and converting change into opportunity.

Fluctuations in the financial services industry offer opportunities for smart organizations to evaluate their systems and processes and invest in those that have the most impact on profitability and growth. Organizations that succeed understand that it is wise to monitor business and technology trends and plan investments accordingly.

Combining our strength in enterprise technologies with the industry-specific knowledge of our valued partners, we offer solutions for the Financial Services sector that work within a cost-efficient IT infrastructure to help solve your most pressing business concerns.

In our work with enterprise organizations, we see these financial services trends and offer technology solutions to proactively address them:

- The consumer is in control
- Information is your business
- The value chain is global and regulation is growing
- Increasing business complexity is the norm
- Execution excellence is critical

© 2010 Microsoft Corporation. All rights reserved. Microsoft and the Microsoft logo are registered trademarks of Microsoft Corporation in the United States and/or other countries. The names of actual companies mentioned herein may be the trademarks of their respective owners. This document is for informational purposes only. Microsoft makes no warranties, express or implied, with respect to this document or the information contained in it.

Learn more about our Advisory Services Solutions at www.microsoft.com/FinancialServices.