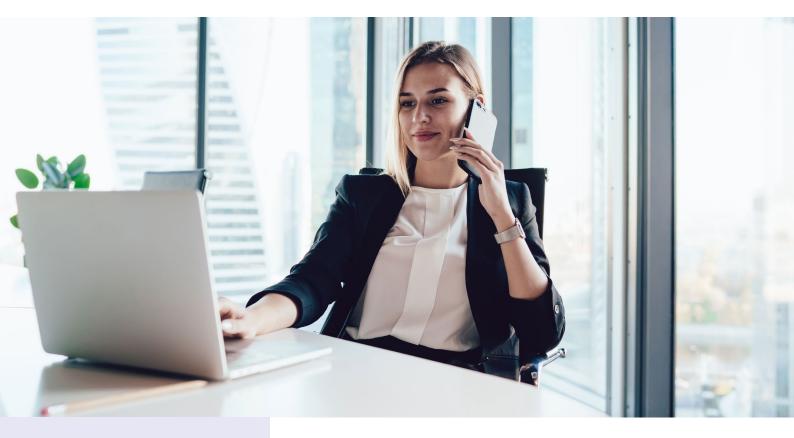**opentext**™

SOLUTION OVERVIEW

Bring service innovation to banking

Get a 360-degree view of the customer to empower employees
and transform engagements

Gain a competitive edge in a digital world

Empower a remote and distributed workforce

Deliver optimal employee engagements

Enforce governance and risk management

Mounting customer expectations, a rise in the remote workforce and regulatory changes require banks to optimize operations to remain competitive. Financial Services institutions need to consistently deliver trusted, relevant and optimal experiences that customers demand, across all channels, every time. Yet, information is often stored in multiple systems, limiting visibility into the complete customer lifecycle and leading to service delays, incorrect information and poor service.

With customer information management for Banking from OpenText™, banks gain a 360-degree view of the customer to enable consistent sales, service and marketing interactions across the entire organization and ecosystem. They can bring together internal and external documents into a central solution and organize and integrate data and content as it flows through business processes. With these capabilities, banks get a single source of truth to drive personalized engagements, improve collaboration and ease audit and compliance reporting. Plus, employees can securely capture, govern and exchange information to use it to its full potential, improving data quality while driving productivity.

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Gain a competitive edge in a digital world

Modernize operations and deploy process automation to drive efficiency and improve agility. Customer information management allows banks to create opportunities to re-engineer processes based on customer and employee needs, delivering digital experiences and adapting to shifting market expectations. By optimizing and automating repeatable business processes, banks can reduce transaction times, expedite customer onboarding processes and ensure consistent execution across departments.

Empower a remote and distributed workforce

Enable employees to stay informed and productive, wherever they are. Customer information management connects content and processes, enhancing collaboration on projects—both within and beyond the bank. Collaborating in the cloud allows users to securely share, store and access information assets, from existing on-premises applications or in the cloud, while maintaining the integrity of their content. Plus, with an enterprise-grade electronic signature solution, employees and third parties can sign quotes and contracts quickly and with ease.

Deliver optimal employee engagements

Exceptional experiences at all stages of the customer journey build relationships that last. By integrating content services and enterprise content management (ECM), banks can connect employees to information within critical business systems, such as SAP®, Microsoft® 365 and Salesforce®. This bridges content silos to ensure all stakeholders are working with the most current and relevant content, delivering a single source of customer truth. In addition, leveraging advanced artificial intelligence and data analytics results in actionable customer journey insight, powering intelligent self-service and individualized customer interactions.

Enforce governance and risk management

Support compliance and governance while keeping data live and accessible for daily operations. Ease document collection while allowing users to access and search content from anywhere to support internal and external audits. Deploy a modern archiving solution to keep historical content stored in line with compliance requirements while enabling secure access to content needed for everyday tasks.

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Join the conversation

Learn more

Customer information management solution components	
OpenText™ **Intelligent Capture**	Automate process initiation across departments with a single platform
OpenText™ **AppWorks**™	Build digital business applications at digital speed
OpenText™ **Extended ECM**	Integrate content services with lead applications to bridge content silos, expedite information flows and expand governance
OpenText™ **Core Share**	Stay connected and productive from any location
OpenText™ **Core Signature**	Keep critical approval processes flowing
OpenText™ **InfoArchive**	Accelerate cloud transition, optimize infrastructure and ensure compliance with a modern archiving solution
OpenText™ **Magellan**™	Augment data-driven decision making and accelerate business with advanced artificial intelligence in a pre-built machine learning and big data analytics platform

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: **opentext.com**.

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