



Whitepaper: Using SharePoint 2013 in Banking & Financial Service Industry

Overview

As we are seeing a paradigm shift in the regulatory environment, with changing compensation rules and threat to the banking secrecy. At same time, the competitive landscape changing with more demanding client, pressure on pricing level, change in Infrastructure and increased Global competition.

Microsoft SharePoint 2013 with broader functionality make it a most unique enterprise solutions available in the market to overcome challenges faced by financial services sector. Microsoft SharePoint is like a web application framework and platform which comes with the new ways to share, sync, communicate and organize people and content within your organization.

Banking & Financial Services Industry

The Financial services sector is the largest and most sophisticated market for IT and IT enabled services (ITES). In the history of financial services rarely banks & securities service face such a massive challenges.

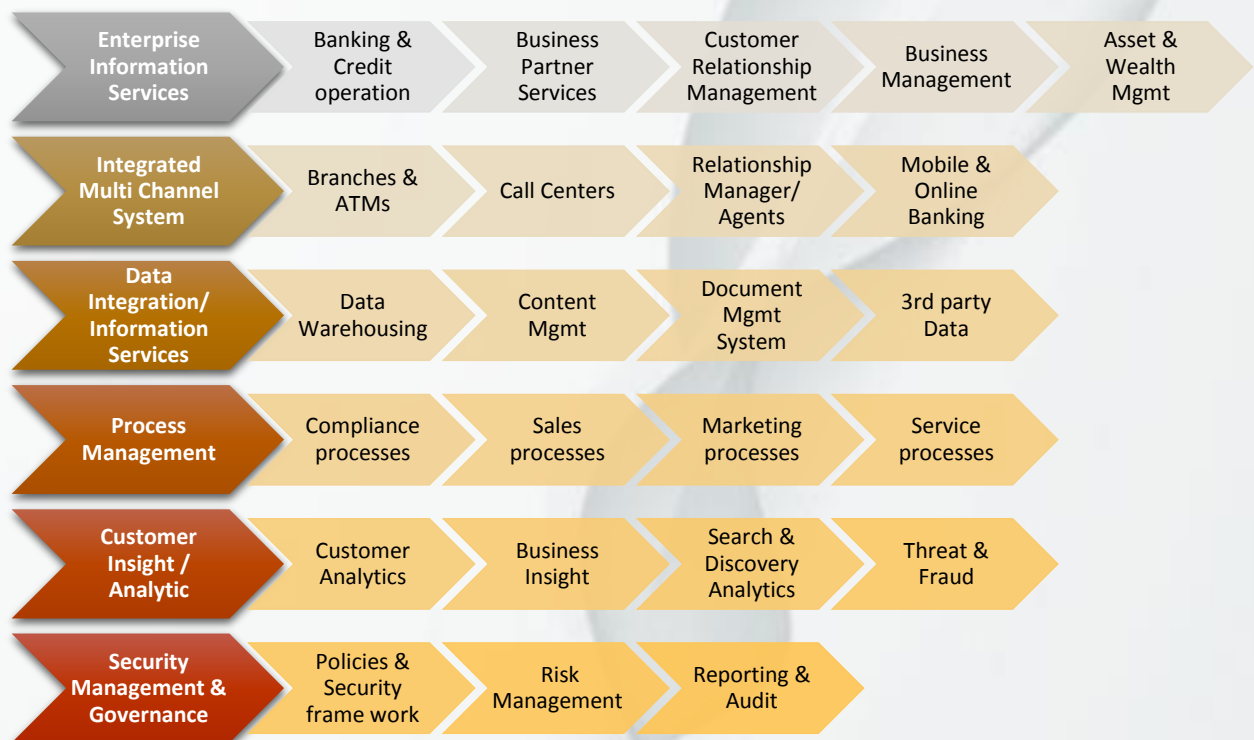
Financial service institutions are constantly balancing increasingly competitive business drivers with the complex requirements of compliance as well as overall IT security. SharePoint make it easy with integrating all the required service at single platform.

Challenges	Data Intergration & Information Services	Microsoft SharePoint provide banking & Financial Services industry with the technologies and Framework to deliver the best solution to overcome their many challenges. Availability of right
	Operational Efficiencies	
	Business Management	
	New Technology adoption & Integration	
	Compliance & Regulatory	

information at right place at a right time will enhance productivity and lead to more cost saving in your organisation.

Microsoft SharePoint 2013 means an integrated environment that consolidated data, Information and process across the organization in a Controlled and Transparent manner.

Following point can be considered while implementing the SharePoint for Banking & Financial Service industry in each case scenario



1. **Enterprise Information Services:** - Provide integrated modular business solution which address all the core needs of the banks with multi entity capabilities to support multiple legal entities.
2. **Integrated Multi-Channel system:** - Providing Customers with multichannel experience and seamless access to the service and allow customers to conduct banking services in a convenient and secure way online, helping them regardless of time and place. Provide financial institution with consistent customer data, comprehensive view of customer, targeted messaging, and single pricing engine.
3. **Data Integration/ Information service:** - To store, access, manages, and share critical documents across a broad range of functions, departments and locations for simultaneous access, digitizes, archive files, track and manage the new file throughout their life-cycle, as they written, modified and updated.



Identify and Retain Your Most Valuable Customers.

4. **Processes Management:** - Improve Compliance & Regulatory work, Increased Organizational Productivity, Increased Sales, Proper management of marketing related work.
5. **Customer Insight/ Analytic:** - Provide you with 360° view of the customer, integrated internal data with external & unstructured data, Dramatically Reduce Marketing Costs through Segmentation, Identify and Retain Your Most Valuable Customers.
6. **Security, Management & Governance:** - It help you set up a comprehensive security framework, covering data, information and IT security as well as the management of digital identities.

With Octaware technologies expertise, collaborative and innovative approach to effectively implement SharePoint, financial services organizations can gain & rapidly experience the benefits of the following:

- **Reduced Costs**
- **A competitive advantage and provide differentiated solutions to their customers**
- **Increased operational efficiency, Productivity and agility**
- **Certainty in delivery**
- **Faster and More Informed Response to Business Changes**

About OCTAWARE Technologies

Octaware Technologies is a highly experienced offshore outsourcing company with its offices in USA, Middle East and India. The efficient project management and technical support services at customer's location guarantees the successful execution of each project.

The services provided are variant and adapted to the satisfaction and style of the clients. To support the increasing needs of clients and partners, the company has geared up an assortment of professional analysts, designers, developers, and quality assurance engineers.

Depending on the ever-changing requirements, we come up with the essential and up-to-date tools and skills to enhance the clients' confidence in us. Octaware - we believe it as an expression of our creative, innovative and ground-breaking ideas and experience

About Microsoft SharePoint 2013:

Microsoft SharePoint 2013 is one of a leading portal technologies. It has been around since 2001. It is a browser-based collaboration, content management and extensible platform from Microsoft.

SharePoint provides collaboration, websites, social networks, intranet and extranet portals, document & file management, enterprise search, websites and business intelligence. It also has system integration, process integration and workflow automation capabilities.

Features of Microsoft SharePoint 2013



Octaware Technologies

White Paper

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October 2014

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