

## Customer 360 for Financial Services



**A new, innovative architectural approach, the smart data fabric, provides an overarching and non-disruptive layer that connects and accesses information from source systems on demand.**

### Exceed Customer Expectations

To maintain competitiveness and grow revenue, financial services firms are making a significant investment in developing customer 360 capabilities, so they can deliver personalized customer experiences, predict churn, and prevent fraud. To ensure the success of these initiatives, firms need access to customer data spread across data warehouses, data lakes, CRM applications, and other silos, in real time.

InterSystems makes it faster and easier to create and maintain a complete 360-degree view of customers. Our next-generation approach to data management, leveraging a smart data fabric architecture connects data across internal and external systems and applications without disrupting existing infrastructure.

### The InterSystems Difference

#### Simplifies Data Access

Integrates real-time data from all customer transactions, such as credit card or trading activity, loan payments, deposits and withdrawals, along with historical and CRM data, and transforms it into a unified format to feed predictive and prescriptive analytics.

#### Non-Disruptive

Complements existing infrastructure, providing a non-disruptive layer that connects and accesses information from legacy systems and applications via a smart data fabric.

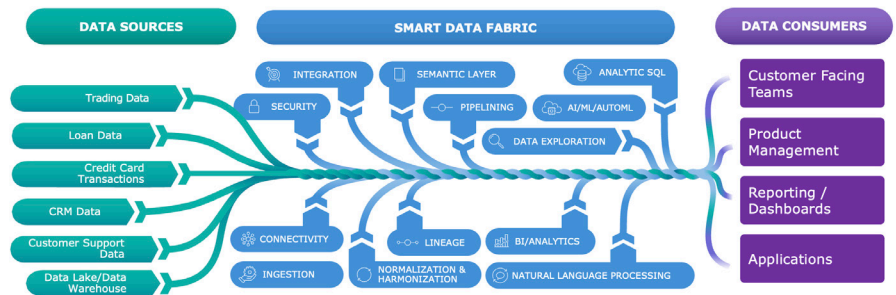
#### Fast, Secure, and Reliable

Accesses, integrates, and transforms data as it's being requested in a secure, low latency environment, built on a data platform designed for high-performance mission-critical applications.

## Customer 360 for Financial Services

Customer 360 for financial services is powered by a smart data fabric approach, providing firms of all sizes and in all sectors with a better, faster, and easier way to deliver benefits to the business.

Rather than duplicating data and creating yet another silo through complex ETL processes that need manual customization and introduce latencies, it lets the data reside in the source systems, where it's accessed on demand, as required, ensuring the information is both current and accurate.



### Key Benefits

#### Personalized Customer Experience

- Empowers advisors, help desk, and support teams to provide customers with immediate answers and recommendations.
- Optimizes customer-facing digital channels to deliver personalized content, offers, and workflows.

#### Increased Operational Efficiencies

- Simplifies access to data for non-developers, reducing IT manual data integration and transformation efforts.
- Automates data management processing, eliminating errors.

#### Increased Revenue

- Maximizes cross-sell and up-sell opportunities by predicting customer behavior with AI and ML models based on their history and third-party data.
- Incorporates external data, such as changing credit scores, loan-to-credit ratios, and other spending patterns to improve performance.

#### Reduced Churn

- Predicts customers at risk of churning, so appropriate actions can be taken.

### Why InterSystems?

InterSystems is a leader in data management technology used by thousands of clients globally to build and run mission-critical, data-intensive applications. Banks, asset managers, and fintech firms rely on InterSystems for customer 360 use cases, to run trade order management systems, wealth management platforms, regulatory reporting engines, and for business reporting.

InterSystems is committed to excellence through its award-winning, 24/7 support for customers and partners in more than 80 countries.

