

Financial Services



Transforming financial services
through sector-specific software.



FINANCIAL SERVICES

- BANKING, CREDIT UNIONS and BUILDING SOCIETIES
- INSURANCE
- WEALTH MANAGEMENT

The financial services industry is both dynamic and challenging. Scrutiny from stakeholders, including governments, investors, industry groups and consumers, demands the industry acts with the highest integrity, and operates with transparency and accountability. Market volatility, the prospect of acquisition, and increased regulatory monitoring create both internal and external challenges for the financial services sector.

TechnologyOne has worked with a variety of customers across the financial services sector for more than 20 years. Our customers employ software that easily integrates with operational applications, and reports on core financial and operational information to manage business drivers. Due to our customer relationships and our commitment to research and development, our financial services solutions are acknowledged as leading edge.



CHALLENGES

To manage the challenges and needs of this complex sector, corporate management software must address the everyday issues of integration with operational systems, budgeting and cost reductions, company consolidations, product profitability, and real-time reporting. It also needs to facilitate people management and staff retention.

Key challenges facing the sector include:

- Managing information from disparate systems
- Ongoing changes to laws and regulatory compliance requirements
- Controlling costs while improving customer service
- Customer retention in an increasingly competitive environment
- Capitalising on gains from mergers and acquisitions
- Meeting and exceeding the expectations of technology-savvy consumers
- Rebuilding customer confidence and increasing market share after the global financial crisis
- Diversified product ranges
- Building and maintaining market position

The TechnologyOne Enterprise Suite offers one solution with one interface and one database, and is designed to drive innovation, improve operational efficiencies, and introduce measurable process improvement.



ENABLING FINANCIAL SERVICES ORGANISATIONS

Meeting the requirements of a diverse financial services market requires a proven, scalable solution with strong functionality and the flexibility to adapt as organisational, stakeholder, and regulatory requirements evolve.

TechnologyOne offers a complete management system for financial services businesses, such as banks, credit unions, insurance and wealth management. Our solutions allow you to manage budgets, financial performance and stakeholders, as well as performance planning, asset management and human resources. It also integrates seamlessly with third-party operational systems.

Whether your department is focused on finance, stakeholder management and relationships, budgeting, performance and KPI monitoring, or people and culture, TechnologyOne solutions provide the functionality to:

- Deliver faster, more responsive services under tight budgets
- Provide innovative and quality services to all stakeholders
- Increase cost transparency, accountability and adherence to regulations
- Deliver timely, accurate, and relevant budget and management reporting
- Reduce duplication, streamline operations, remove manual processes, improve departmental operations, and achieve integration between business units through seamless sharing of information
- Provide an in-depth view of the business at all levels
- Support distributed organisational structures and financial tracking requirements
- Manage projects and costs
- Manage distributed, enterprise level budgeting and forecasting
- Achieve savings and maximise the value of technology investments



THE SOLUTION

TechnologyOne's Financial Services solution is totally integrated and has been developed to meet the unique and varied business requirements of financial services organisations.

TechnologyOne has worked closely with a number of our financial services customers to determine the industry's strategic and operational challenges, and the specific solutions required to overcome them. The solution's functions relate to the corporate, stakeholder and strategic management of a financial service organisation, including finance, asset services, people and culture, regulatory and operational reporting, governance, and strategic planning.

Our solution offers:

- Totally integrated business intelligence and financial management functionality
- Effective financial performance management of the entire organisation
- Flexible integration options, providing seamless integration to third-party operational systems
- Real-time information for informed decision-making, allowing immediate action to be taken
- Multi-entity accounting and consolidation
- Extensive, flexible subsidiary ledger capability
- Integrated budgeting and forecasting
- Project management, tracking and costing
- Financial management of assets
- Role based business intelligence and dashboard capability
- Management and development of your organisation's people and culture
- Additional integrated capabilities from our solution suite, such as document management
- Enhanced and streamlined business processes
- Reduced and reliable implementation and service timeframes



COMMITMENT AND EXPERIENCE

TechnologyOne employs a team of financial service experts with extensive experience and a strong knowledge of sector issues and related business requirements.

Our commitment to this sector means we work with our customers to ensure solutions meet their requirements and remain flexible enough to comply with change. We are committed to providing our financial service customers with a long-term development strategy that delivers solutions to meet the challenges of the sector.

Amongst TechnologyOne's many financial services partners are:

- Community Alliance Credit Union
- QIC
- Sovereign
- Australian Central Credit Union
- Institute of Chartered Accountants Australia
- Police Credit Union
- Australian Ethical Investments
- Farmers' Mutual Group
- Sunsuper
- Wilson HTM
- Australian Insurance Holdings



KEY BENEFITS

Your organisation benefits from a proven practice solution developed by experienced sector experts in partnership with our customers. Our solutions drive effective decision-making, improve financial management, and enable strategic planning processes. Staff benefit from business process improvement and an intuitive and consistent user interface that automates day-to-day activities. Your stakeholders benefit from improved transparency and enhanced customer service levels.

Other key benefits:

- Enable proactive decision making and strategic planning
- Consolidate, collect and manage information through a single, integrated solution
- Enable proactive decision-making and strategic planning
- Measure KPIs and understand business benchmarks to improve performance
- Minimise risk and improve governance
- Improve data relevance, consistency, accuracy, and security
- Deliver better service to stakeholders and business partners
- Enrich the user experience



PROVIDING VALUE

Your organisation can fully realise the ways technology can improve and automate processes, reduce costs and facilitate cost effective, meaningful and consistent interactions with stakeholders. The TechnologyOne enterprise solution delivers a preconfigured solution approach to the many organisational functions banking, insurance and wealth management businesses deal with on a daily basis.

Our team of experts work with your organisation throughout the entire process; from need identification to implementation and go-live. TechnologyOne's upgrade strategy also allows your organisation to take advantage of annual optional upgrades at no additional licence cost. Our upgrades are easy to install and provide your organisation with new features and functions to keep pace with a continually changing financial services environment.

TechnologyOne works with your organisation to facilitate the following:

- Full implementation services – ensuring our solutions fit your business
- Project management – solutions implemented on time and on budget
- Data conversion – populating your new solution with meaningful information
- Customer relationship development – one point of contact for all your ongoing business needs
- Ongoing service and support – simple access to local resources both onsite and online, and a rapid response to support issues



Why choose TechnologyOne as your preferred software vendor?

TechnologyOne has a proven track record of delivering integrated business solutions to the financial services sector for more than 15 years. Financial service organisations are diverse in nature and scope, and need software that offers full integration and true flexibility. Fragmented software solutions compromise efficiency and increase organisational risk. As technology is increasingly viewed as a driver for transforming and enhancing business operations, why not choose one integrated solutions partner like TechnologyOne?

We provide a whole-of-organisation enterprise solution, one committed vendor relationship, one point of contact for all your questions, one consistent interface for all your business tools, and one supplier of consistently excellent software and services.

Other reasons to partner with TechnologyOne:

- More than 15,000 people use our solutions every day
- More than 800 organisations rely on TechnologyOne software to improve their business performance, including councils, governments, large corporations, financial service businesses, utility providers, universities, and health and community services
- Our corporate headquarters is Australia's largest commercial R&D centre for software development
- Our R&D teams partner with our financial services customers to ensure we design best-in-class, market-leading solutions for the industry
- We invest more than 20% of revenue in R&D to ensure our software maintains pace with changing regulatory, legislative and customer requirements
- We have 13 offices across Australia, New Zealand and the United Kingdom, and a presence in seven countries
- We are a major publicly-listed Australian company, and we are stable, secure and growing
- Our Connected Intelligence solution is a generation ahead of our competitors' functionality-centric ERP (Enterprise Resource Planning) applications

About TechnologyOne

TechnologyOne (ASX:TNE) is a leading enterprise software solutions provider. For more than 20 years we have been providing deeply integrated software solutions for business, government, financial services, health and community, education and utilities organisations. Tens of thousands of people each day use our world class solutions, which we develop, implement and support.

Our organisation wide solution suite, integrated solutions, and custom designed solutions provide world-class services that are based on leading edge technology and are backed up by a substantial R&D program, providing our customers with a long-term, secure and valuable partnership. TechnologyOne employs more than 700 people and has a presence in seven countries.



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One vision. One vendor. One experience.

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