

Trading Digital Workspaces

A Financial Services Case Study

Investment and financial services firm transforms its customer service and end-user support processes with Atos' Digital Workplace.

Challenge

A large investment and financial services firm was looking to reduce the costs of customer and end-user support while delivering a streamlined, interactive service experience. To accomplish this, the company wanted to migrate from its traditional legacy systems to an agile, next-generation technology environment, with minimal business disruption. The solution needed to address key market challenges such as:

- Heightened customer expectations due to the proliferation of online and mobile platforms
- The need for integrated channels with consistent, personalized service
- Remote and mobile workforces changing the way business is conducted
- Tightened regulations regarding data security and auditability
- Emergence of non-traditional competitors not burdened by legacy environments
- High-speed, high-volume trading putting increased pressure on technology infrastructures and work processes.



The firm selected Atos, one of its long-term strategic technology partners, to assist in this transformation. The decision was based on Atos' proven ability to meet the financial services industry's rigorous performance and reliability requirements, along with its vision for the future of innovative, connected workplaces.

Trusted partner for your **Digital Journey**

Atos

Solution

Atos proposed a transformation of the company's customer service and end-user support functions to an updated platform based on the Atos Digital Workplace, a suite of collaborative, secure, intelligent work tools delivered as services. This platform provides intelligent support embedded with security, automation and analytics.

The solution consists of a flexible suite of managed services and workspace tools, combining multiple support delivery methods to achieve the optimal balance of responsiveness, personalization and cost efficiency. Support is provided through Atos' global service desks, a dedicated customer service center, onsite support teams, and online, with innovative automated and self-help support functions available through Atos Digital Workplace. Users receive a consistent support experience regardless of their method of access.

The solution also includes tools for business analytics and service management/oversight that enable the firm to continually measure and improve the performance of its support functions.

Service desk services. Atos provides service desk support to the firm's users in branches around the world, on trading floors and online, including a dedicated 24x7 global help desk for customers. The service desk acts as a clearing house for all incidents, either resolving them immediately or prioritizing and routing them to the proper agents. The service structure is optimized to adapt to changing needs. For example, the offshore-to-onshore ratio can be changed as more automated tools and processes are added, enabling future savings targets to be met while maintaining business continuity.

To accommodate the strict rules for financial service companies regarding off- and on-premises data, flexible cloud and traditional delivery options are provided for locations where platforms, appliances and customer data reside.

Support is automated whenever possible, and users can access a Service Desk Virtual Agent for immediate self-help.

Business analytics tools provide valuable insights into the journeys that users take when interacting with the firm's digital channels. Journey Analytics powered by ClickFox analyzes customer behaviors and motivations across different customer touchpoints, such as the web or customer call centers, and over time. It allows companies to optimize interactions, predict future behavior, and invest in enhancements that will improve future customer experiences.

End-user computing. Down time can be catastrophic in the financial services industry. To keep users productive, Atos provides support through its global network of field technicians, and will be staffing onsite "technology bars" for end users in the firm's campus sites.

Atos provides dedicated onsite support for the trading floor, where a system problem could translate into a loss of millions of dollars over the course of a day. Technicians monitor the performance of all trading floor devices so they can predict and address device performance problems before users are even aware of them.

In addition, the Digital Workplace platform contains automated, standardized identity and access management features that help ensure compliance with data security and antifraud regulations. Users' access to servers and services can be made conditional upon, for example, their location (office, remote, or trusted facility) and the update status of their device's operating system and virus protection.

Atos is focused on streamlining workflows while conforming to security constraints that are unique to the financial services industry. In one example, ID and password resets are being automated in compliance with a requirement to contain these activities behind firewalls.

Outcomes

As a result of the workplace modernization efforts, customer service satisfaction rates are now at 9 out of 10. In addition, the increased automation and integration are projected to save 20% to 30% on operational costs of serving the customer. With that, the firm is in a good position to deliver on its goal of 10% return on equity to its shareholders.

To enable further efficiencies in the future, the firm is exploring use of OpenScape Xpert, Atos' virtualized, software-driven smart trading turret solution. OpenScape speeds trade execution by bringing together multiline voice, instant message, video and other sources. It handles high volumes of calls from on and off the floor simultaneously and connects the entire trading environment with a flexible and fully virtualized back office.

Why Atos for financial services

With more than 100,000 employees in 73 countries, Atos has the scale to deliver homogenous services to a large user base spread over multiple branches and offices throughout the world. Customers can rely on our experience safeguarding the world's most critical data via our unique expertise in security solutions, access controls and virtual workplace management.



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