Banking HyperIntelligence Cards

Answers that find you

Stock Ticker Card

Use Case

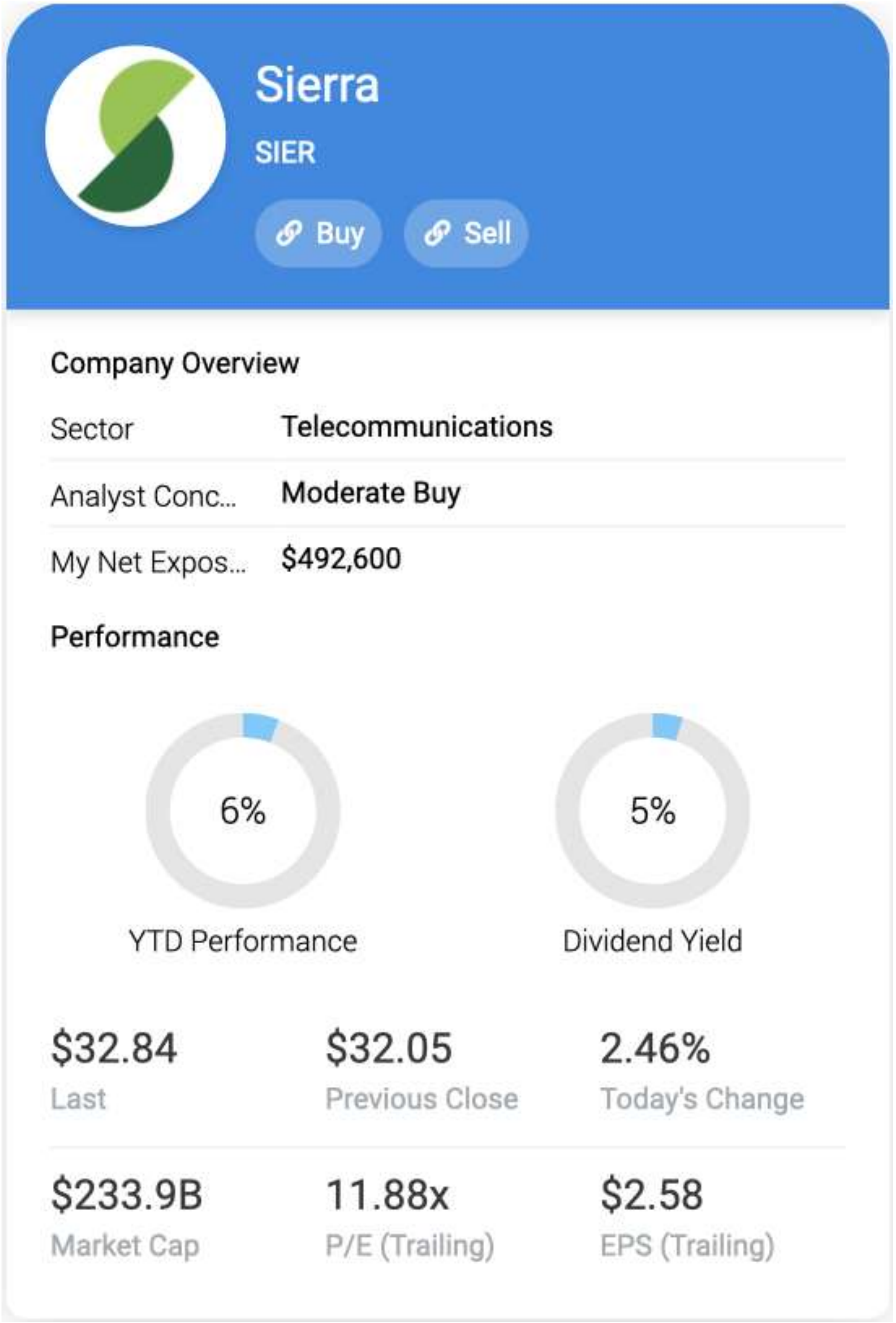
Boost the productivity and performance of asset management, equity analysis, and private wealth management teams by giving them instant access to stock information from websites and applications

Users

Asset Management, Equity Analysis, Private Wealth Management

Business Value

Improve the workflow of users who are analyzing sectors and companies through browser applications or websites by eliminating the need to navigate to a separate tool. Provide users with key financial metrics, analyst information, and research links so they can make more intelligent trading decisions.



Branch Card

Use Case

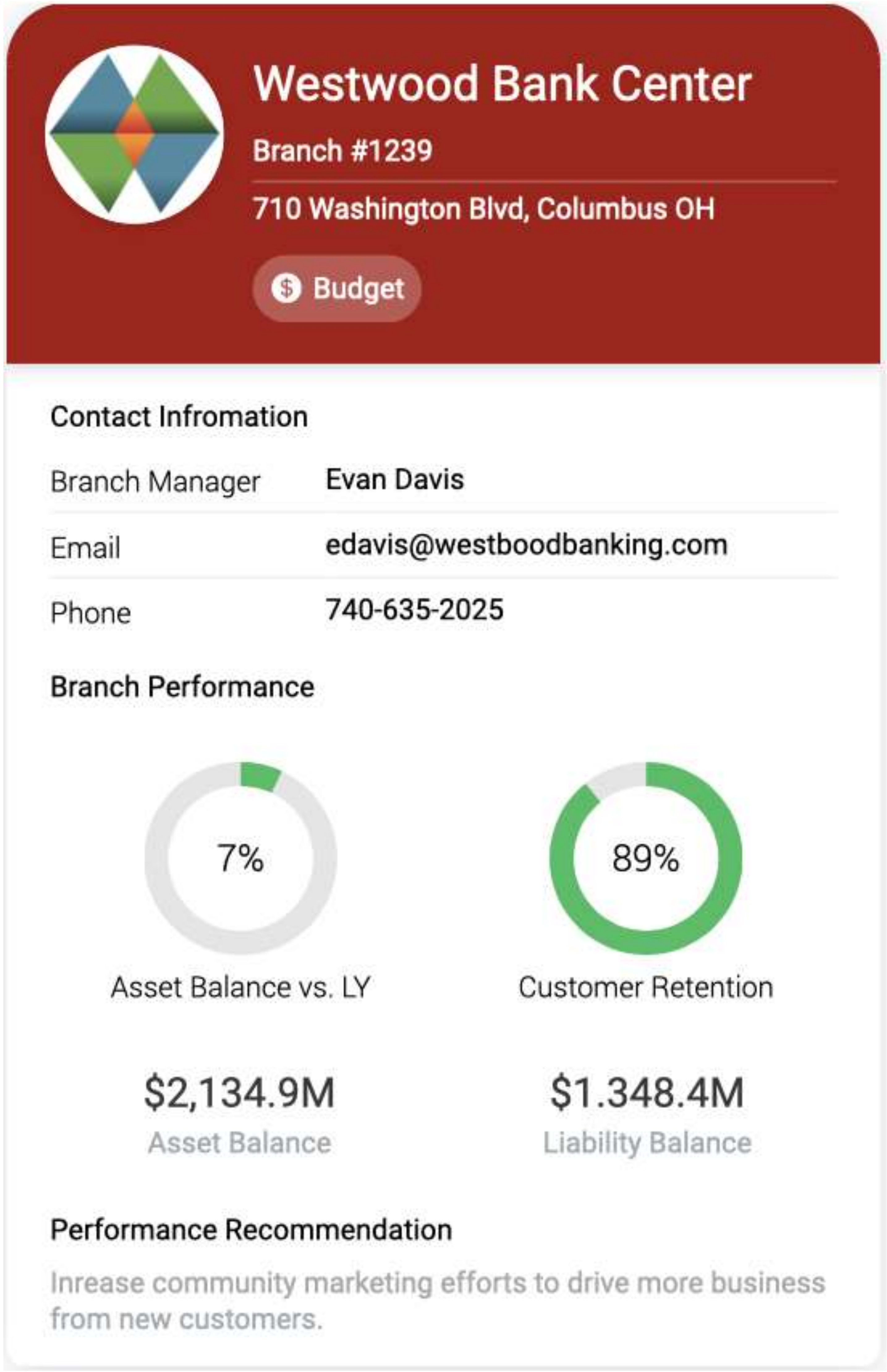
Provide banks with easy access to real-time branch performance information—helping them to drive profitability and customer service improvements

Users

Branch Manager, District Branch Manager, Regional Branch Manager

Business Value

Understanding branch performance is critical for banks to run their business profitably. Arming branch operations personnel with instant information on performance metrics related to assets, liabilities, income, payroll, marketing, and customers empowers banks to optimize operations and deliver an outstanding customer experience.



Sales Rep Client Card

Use Case

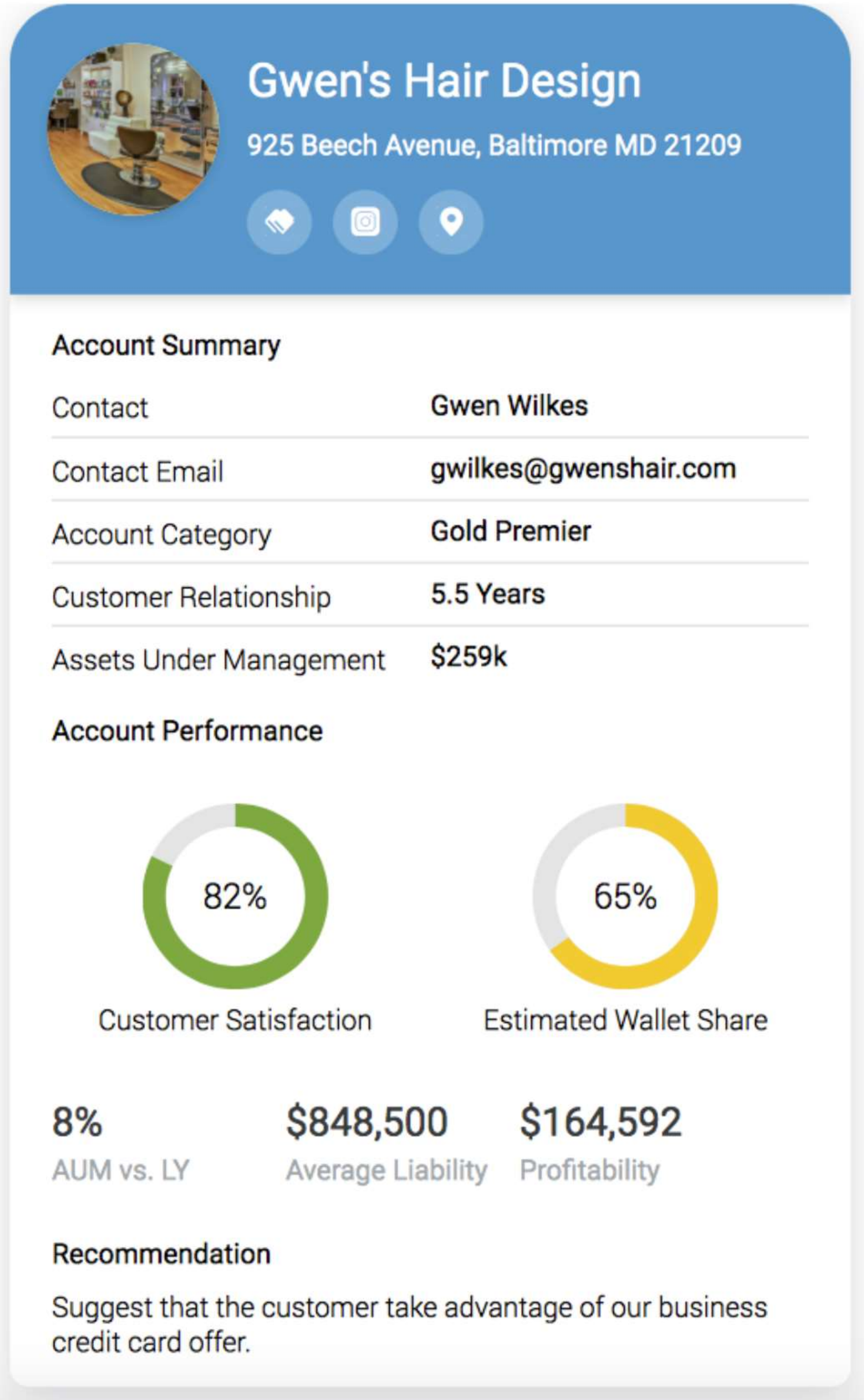
Boost the productivity and performance of banking sales teams by giving them instant access to the information they need to make fast, informed recommendations while meeting with their clients

Users

Sales reps for business banking, commercial banking, or personal banking customers

Business Value

Today, customers have more choices on how, when, and where to bank. It’s critical that sales reps make the most of every client interaction in order to drive profitability and customer loyalty. Arming sales reps with relevant data at the point of customer interaction empowers them to close deals more quickly, develop better customer relationships, and differentiate themselves from the competition.



Wealth Management Client Card

Use Case

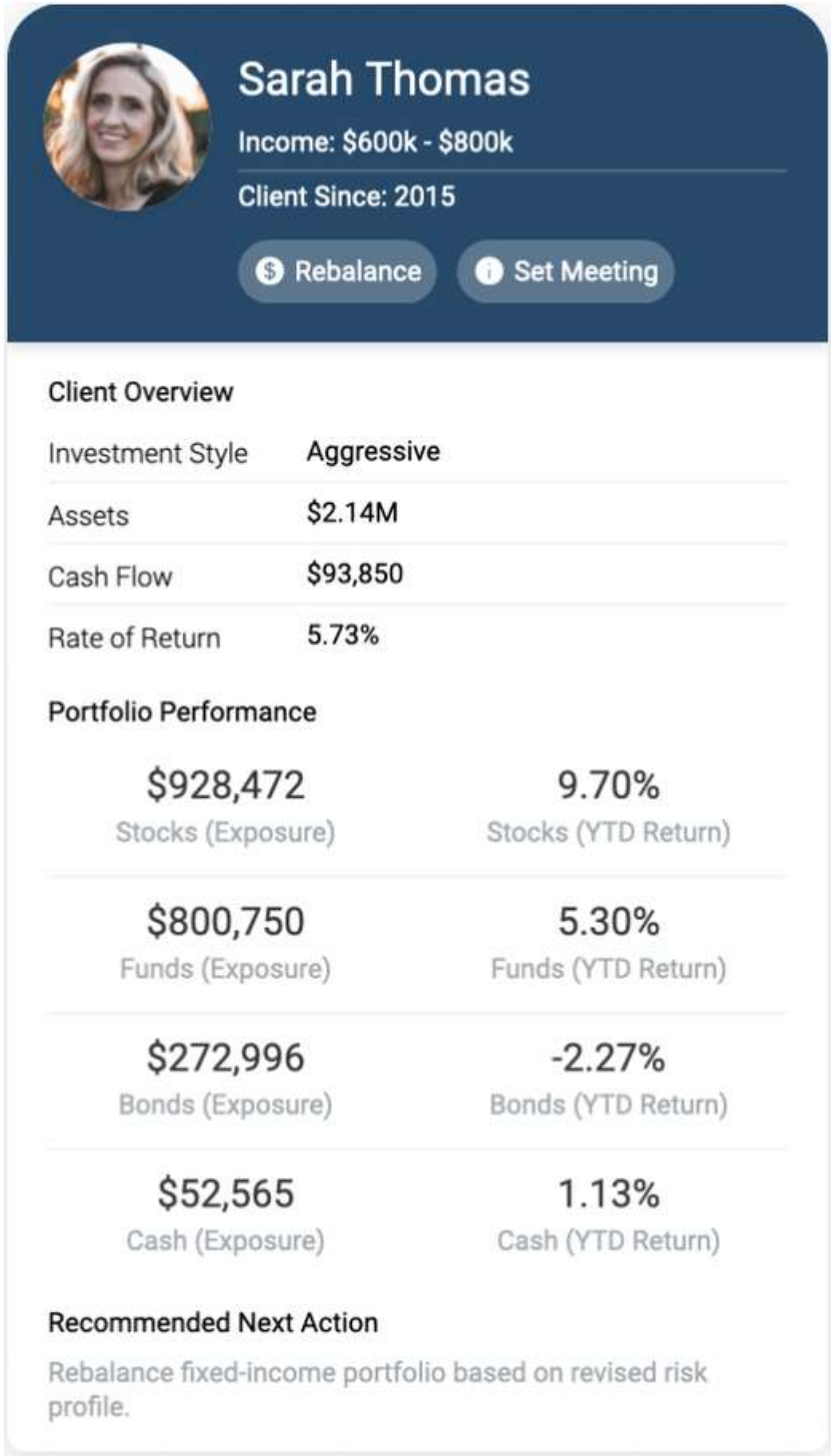
Provide wealth advisors with instant insight into portfolios so they can perform better and deliver superior client service

Users

Wealth managers, asset managers, financial advisors

Business Value

High-net-worth clients expect exceptional customer service. Giving wealth managers instant access to critical information on their clients helps them to make more informed investment decisions and deliver tailored, personalized customer service–resulting in better outcomes and happier, more satisfied clients



Wealth Manager (Employee) Card

Use Case

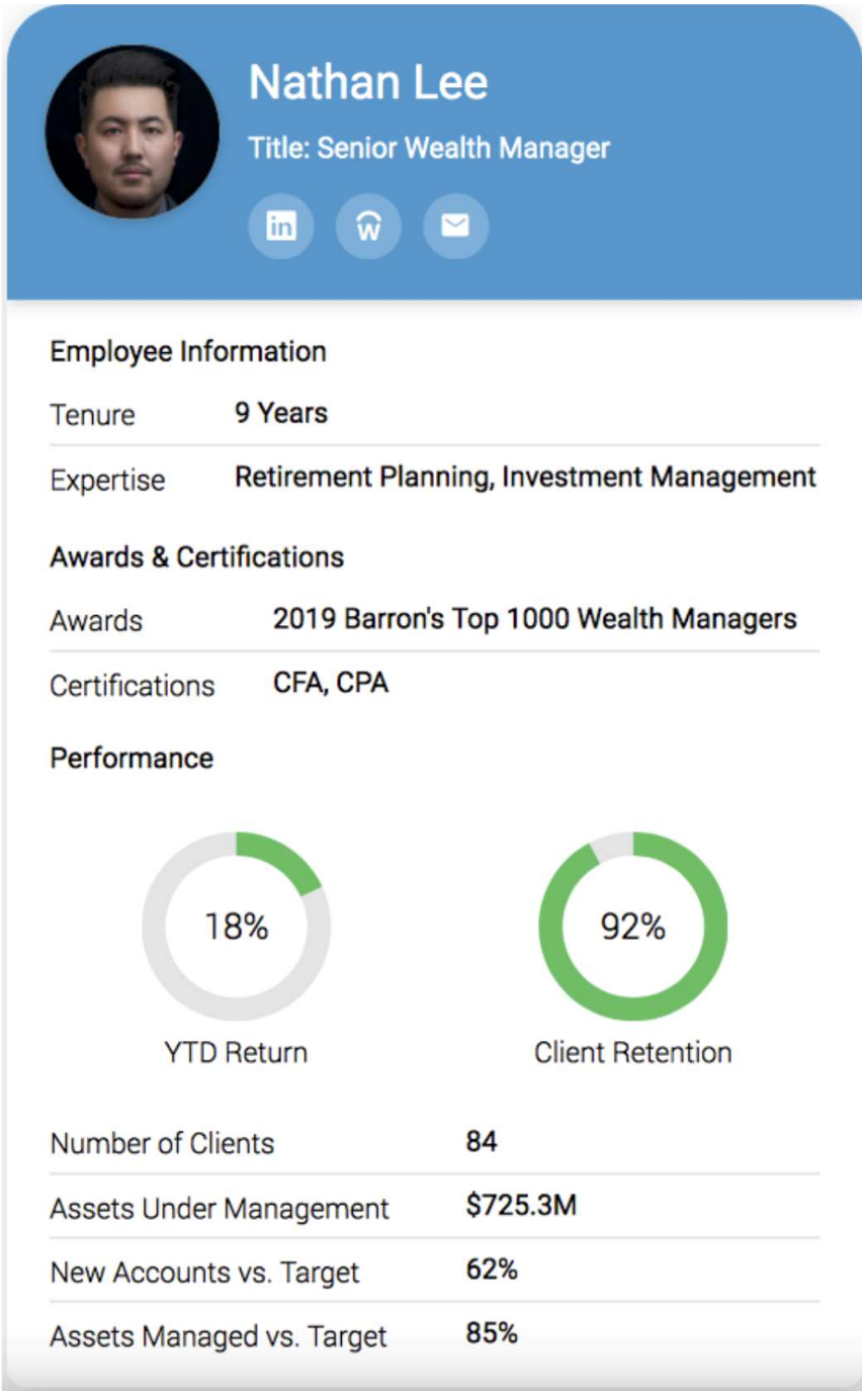
Quickly access information about specific wealth managers or other employees from within the websites, applications, and devices people use every day

Users

Wealth managers, supervisors, HR, internal employees

Business Value

Giving internal professionals instant access to actionable employee information ensures that resources are intelligently allocated, improving the profitability of projects and customer relationships.



Investment Portfolio Card

Use Case

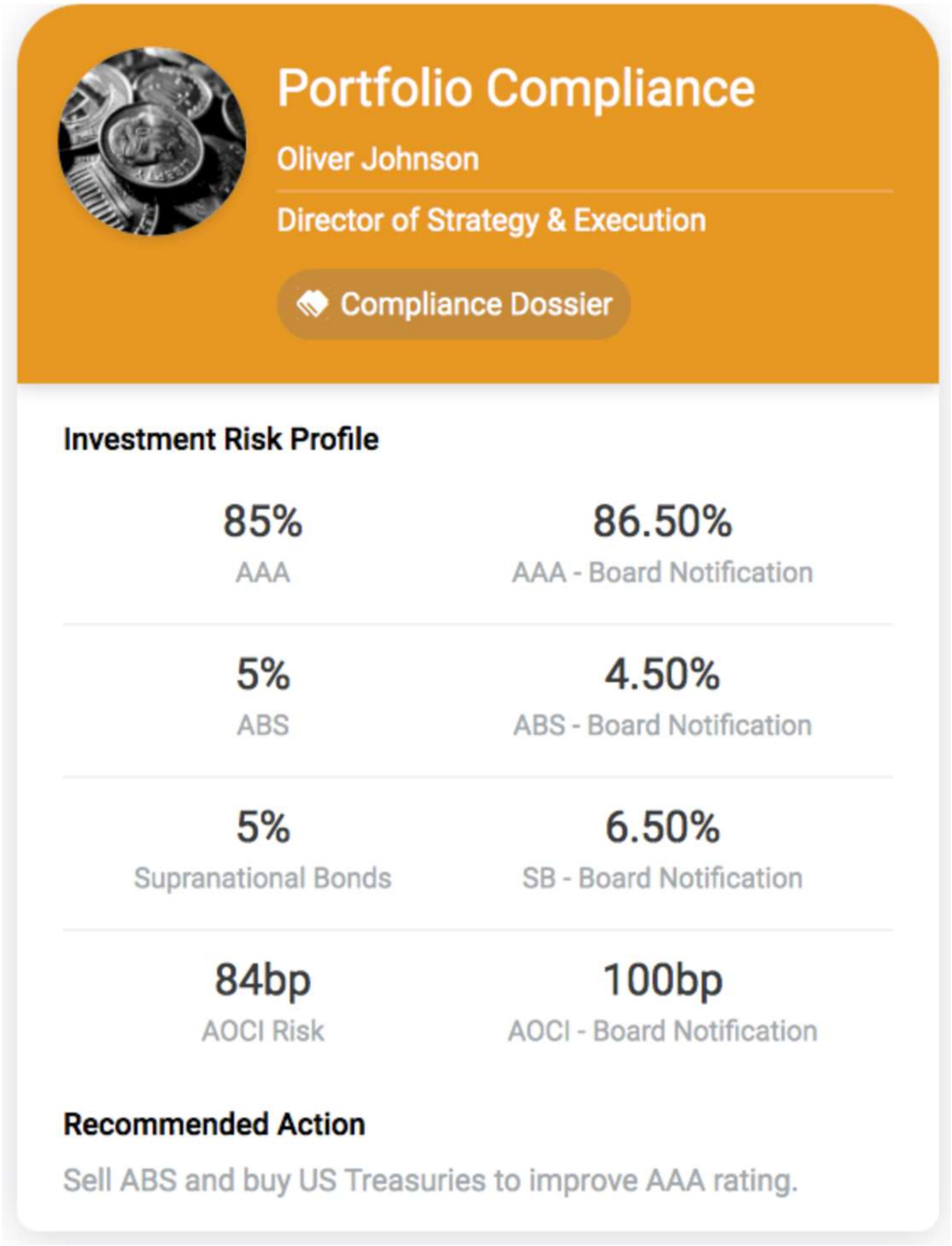
Provide banks with easy access to the latest trading activities—helping to ensure compliance and improve trading decisions

Users

Treasury, Balance Sheet Management, and Compliance teams

Business Value

Ensuring that a bank is compliant, while also reflecting the organization’s risk tolerance and financial goals is critical to overall success. Arming treasury, balance sheet management, and compliance teams with instant insights into investment portfolio compliance status metrics helps banks ensure they are financially secure and making appropriate trading decisions.



Risk Card

Use Case

Easily monitor key risk performance metrics, forecasts, and targets to mitigate regulatory, external, and internal risks

Users

Balance Sheet Management, Risk Management, and Compliance Teams

Business Value

Banking risk management practices are complex and continuously evolving. Arming balance sheet management, risk management, and compliance personnel with instant access to critical risk information enables them to quickly identify potential risks so they can take precautionary actions to mitigate issues.