

Oracle Financial Services Institutional Performance Analytics



Today's banking customer is different than yesterday's banking customer. The market is saturated. Products are rarely, if at all, differentiated. To add to this, information about competitive products is easily available to consumers for comparison and decision-making. Due to these factors, financial institutions are finding it more difficult to attract new customers or retain existing ones. Oracle Financial Services Institutional Performance Analytics provides deep insights about institutional customer engagements and enhances the ability to stay abreast of the details and analytics surrounding a firm's customers and their performance with the bank. This information helps a financial institution stay competitive and profitable in the marketplace by enabling growth driven by rich customer insights.

KEY FEATURES

- Utilize scenario analysis to enhance visibility of events on profitability
- Proactively target customer segments through monitoring of behavioral trends and Opportunity analysis
- Track and manage partner developments and relationship management
- Enterprise-wide reporting through conformed dimensions and consistent definitions and calculations
- Evaluate customer profitability against out-of-the-box customer segmentations

KEY BENEFITS

- Achieve 360° view of the customer relationship
- Allow senior management to stay current in their understanding of the customers' financial needs
- Reduce dependence on internal resources to quickly deliver value through out-of-box reports
- Ability to drill-down through aggregated reports and identify profitability across dimensions
- Measure risk-adjusted performance of individual accounts and customers

Track and Manage Organizational Efficiency

In order for a business to be successful, they must have comprehensive insight into customer engagements across products, expenses and distribution. It is important to track and monitor profitability by industry, line of business, products, relationships, demographics and customers — both on-demand and in real-time. Without timely analytics to monitor success, the bank opens the door for competition to step in and take over.

Oracle Financial Services Institutional Performance Analytics allows senior management to stay current in their understanding of the customers' financial needs. With product-specific analysis including customer distribution across industry, customer segments, regions, balance maturity and asset-liability balances, Oracle Financial Services Institutional Performance Analytics enables executives to track and manage efficiency of organizational investments, including partner developments and relationship management. Additionally, the application uses scenario analysis to enhance an executive's visibility of foreseen events on profitability.

Make Informed Decisions with Comprehensive Reporting

Ensuring competitive advantage is a difficult task that includes a plethora of activities within the bank, from sales pipeline to customer engagement and satisfaction. Oracle Financial Services Institutional Performance Analytics monitors and manages product performance and product strengths across various customer segments. In addition, top-performing relationships, channels, customers, and relationship managers are identified and then built upon throughout the enterprise.

RELATED PRODUCTS

The following products are also available from Oracle Financial Services Analytical Applications:

- Oracle Financial Services Retail Customer Analytics
- Oracle Financial Services Retail Performance Analytics
- Oracle Financial Services Enterprise Financial Performance Analytics
- Oracle Financial Services Profitability Management
- Oracle Financial Services Funds Transfer Pricing
- Oracle Financial Services Price Creation and Discovery
- Oracle Financial Services Analytical Applications Infrastructure

With a top-down, enterprise-wide view of all organizational investments and campaigns, senior management can track daily operations through a fully automated and extensive set of dashboards and reports that summarize the performance of key business drivers across lines of business. This information is imperative throughout the organization.

Gain a 360° View of the Customer Relationship

Institutional performance and success is not feasible without profitable and satisfied customers. Consumers today require their banks to understand their financial wants and needs and the tasks they will complete to fulfill them. Oracle Financial Services Institutional Performance Analytics proactively targets customer segments through monitoring of behavioral and engagement trends. Management can monitor and measure the lifetime value of a customer with the bank.

With this 360° view of the customer relationship, banks now have key insight into the enterprise-wide relationships of the customer, the instruments the customer holds and the associated performance of each of those instruments to influence further up-sell and cross-sell.

About Oracle Financial Services Analytical Applications

Oracle Financial Services Analytical Applications bring financial institutions best-of-breed capabilities to proactively manage Financial Crime, Compliance, Risk, Treasury, Finance and the Front Office. The applications are built upon a commonly available analytical infrastructure consisting of a unified financial services data model, analytical computations, a Metadata driven "R" modeling platform, and the industry-leading Oracle Business Intelligence platform.

A single, unified data model and infrastructure provides one version of the analytical "truth" to business users throughout the entire enterprise. This enables financial services institutions to confidently manage performance, governance, risk and compliance. Shared data, metadata, computations and business rules enable institutions to meet emerging business and regulatory requirements with reduced expenses and the unified platform helps financial institutions to leverage existing investments.

**CONTACT US**

For more information about Oracle Financial Services Institutional Performance Analytics, visit oracle.com/financialservices or call +1.800.633.0738 to speak to an Oracle representative.

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Hardware and Software, Engineered to Work Together

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