

# Collaboration and Productivity in Financial Services

## Microsoft 365—the world's productivity cloud for financial services

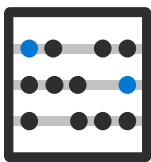
- Connected experiences
- Integrated workflow
- Intelligent security

## Microsoft Teams—the single, secure hub for teamwork in financial services

According to research, up to 80% of financial services employees' time is spent on repetitive, manual tasks. With Microsoft Teams, financial services employees can accelerate their individual and group productivity to improve customer experiences, resolve business challenges and drive efficiencies across common business processes.

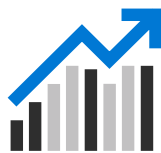
Microsoft Teams powers a new world of productivity for many companies across the financial services spectrum: retail banking, commercial banking, asset and wealth management, traders, investment banking, life insurance, and property/casualty insurance.

Microsoft 365 and Microsoft Teams can help power multiple different business scenarios in financial services. Example scenarios include:



### Banking

- Proposal management (consumer and commercial)
- Teller enablement
- Shift management
- Incident and crisis management
- Virtual banking
- Customer service management
- Product ideation and offer management



### Capital Markets

- Research collaboration and distribution
- Trade collaboration
- Asset and portfolio management
- Investment banking pitchbooks
- Wealth management client communications



### Insurance

- Claims investigation
- Claims management
- Corporate office/field agent collaboration
- Micro-education for agents
- Crisis management

# Microsoft Teams—the single, secure hub for communications and collaboration



## Communications

Microsoft Teams provides all-in-one, rich enterprise communications capabilities for front, mid and back office employees. Teams users benefit from multiple communication channels include secure, persistent chat messaging, voice calling, video calls, and online meetings.

Financial institutions using Microsoft Teams can also leverage advanced messaging capabilities including:

- **Priority notifications** for urgent messages
- **Role-based /Tag messaging** to reach a specific type of user or group of users
- **Federated messaging** that extend communications to authorized external parties
- **Read receipts** for chat messages or workflow
- **Message escalation** to another user when intended recipient is unavailable or out of office
- **Image annotation** to capture rich details on shared photographs



## Collaboration

Financial institutions must keep up with rising customer demands as well as the financial marketplace. Microsoft Teams provides a rich canvas for secure collaboration between employees (and customers / partners) with Microsoft Office tools such as Excel, PowerPoint and Word. In addition, employees can collaborate using other Teams apps like Planner, custom built apps, as well as third-party applications from the broad Microsoft partner ecosystem.



## Platform for Productivity

While Microsoft Teams is a robust solution for communications and collaboration, it is also the platform for other productivity applications. Conceive, design and build custom banking or insurance applications and include them inside a Teams channel. In addition, financial institutions can embed applications like a CRM system, core banking system, claims management system or market feed.

- **Tabs** allow line-of-business applications to be embedded directly into a Teams channel
- **Bots** can be injected directly into Teams channels
- **Message extensions and cards** empower users to explore details or take specific actions
- **Task modules** allow users to create a richer experience for users
- **Notifications** can be leveraged to get a users attention or request action



## Security

Microsoft 365 and Microsoft Teams provide strong enterprise security for the financial services industry including capabilities to help protect sensitive information and prevent information exchanges that could lead to organizational conflicts of interest. Microsoft Teams provides information protection capabilities including:

- **Private channels** for private and sensitive content
- **Business information barriers** ('ethical walls') to help mitigate conflicts of interest
- **Archival** of communications and content in immutable form
- **Auditing and reporting** of activities, communications and business events
- **Retention and preservation** policies to retain information for industry-mandated time periods
- **Legal hold and eDiscovery** to support holds of information for litigation and other matters
- **Data loss prevention (DLP)** to help prevent unauthorized data exfiltration
- **Compliance** with global standards (e.g. GDPR) and financial services regulations (e.g. SEC17(a)-4)

Visit [Microsoft Trust Center](#) and [Microsoft Service Trust Portal](#) for detailed information on Microsoft's conformance to global standards and financial services regulations.