



MICROSTRATEGY SOLUTIONS FOR FINANCIAL SERVICES

FINANCIAL SERVICES COMPANIES USE BUSINESS INTELLIGENCE SOFTWARE TO IMPROVE PROFITABILITY BY CUSTOMER, PRODUCT, AND CHANNEL, WHILE MANAGING RISK AND CONTINUOUSLY IMPROVING THEIR PRODUCT LINES.

Four of the top five diversified Financial Services firms and other leading companies in the Financial Services sector rely on the MicroStrategy BI platform to make more effective decisions, especially in the following business areas:

CUSTOMER ANALYSIS

- Improve customer satisfaction by analyzing the usage of service channels available to a customer and improving those that are preferred while divesting in those that are under-used
- Analyze customer attrition by expanding what attrition actually means and focusing on the entire product portfolio of a customer, instead of individual products that customers may buy or sell at any time

OPERATIONS & FINANCIAL ANALYSIS

- Analyze internal transactions to identify instances of governance and control failure, excessive control risk, and employee misappropriation of funds
- Analyze existing physical and real estate assets to identify those that are suitable for sale and lease-back, increasing capital base and leading to increased transparency

SALES & MARKETING ANALYSIS

- Promote multi-generational customer optimization by timing the marketing sent to the children of existing profitable customers
- Eliminate poor sales campaigns by ensuring all marketing takes into account the full portfolio of a customer rather than inappropriately targeting (or not targeting) the best potential customers

PRODUCT ANALYSIS

- Predict more accurately which products and services will appeal to an existing customer, which will appeal to new customers, and which are most likely to be purchased
- Identify the financial impacts of specific life events, like marriage, children, housing, and college, and the specific products that appropriately fill the customer's financial needs associated with such events

RISK & FRAUD ANALYSIS

- Identify and analyze issues and events in customer accounts to identify them as mistakes, potential credit risks, or possible identity theft problems
- Understand risk exposure at all levels, including the enterprise level, through aggregation of financial data, operational data, portfolio data, and customer data

CUSTOMER SUCCESSES

H&R BLOCK

- Using the MicroStrategy platform, H&R Block Financial Advisors provides highly secure access to business information for its 1,000 financial advisors by e-mailing 5,000 reports containing customer activity data on a weekly basis.
- Financial analysts at H&R Block use MicroStrategy to analyze employee performance for annual and quarterly achievement recognition.



H&R BLOCK

TRX

- The collaborative MicroStrategy/TRX solution enables multinational and commercial clients to report and analyze charge card and travel data from 29 countries and in 11 languages.
- Today, approximately 10,000 business users perform financial analysis, fraud profiling, risk analysis, and customer relationship management against a multi-terabyte sized IBM® DB2 UDB™ data warehouse.



The MicroStrategy platform supports the technical needs of Financial Services customers:

- Due to their history of product lines, mergers, and growth, Financial Services companies have data greatly distributed across many transactional systems, making a BI platform that can provide analytics and dashboards that pull from multiple sources a must
- The zero-footprint Web interface allows Financial providers to give customers around the world access to their personalized data and immediately perform any ad hoc analysis they desire
- Financial Services companies have access to very private information used for analysis of risk and revenue, so row level (what data you can see) and object level (what functions and calculations you have access to) security within a report or dashboard is essential during analysis

4 OF THE TOP 5 U.S. DIVERSIFIED FINANCIAL SERVICES COMPANIES RELY ON MICROSTRATEGY

"MicroStrategy offers our executives, managers, and information analysts the capability to make full use of the data in order to gain vital intelligence, and to make proactive decisions that can drive efficiency and productivity."

— VANITHA DEVARAJAN, BANK OF MONTREAL

LEARN MORE ONLINE

MicroStrategy was rated #1 in Customer Loyalty, Data Volumes, and Standardization by The OLAP Survey.

For the complete results visit:

<http://www.microstrategy.com/OLAP6Survey>

For a list of customers by industry, including Financial Services, visit:

<http://www.microstrategy.com/CustomerList>

MicroStrategy
Best In Business Intelligence