

OpenText Banking solutions

Optimize customer engagements, gain actionable insights and maintain security and compliance with OpenText Banking solutions



Enhance interactions with customers, partners and employees



Leverage data for meaningful insight



Improve operations to better serve customers



Optimize information exchange

The Banking industry, including retail banks and credit unions, wealth and asset management firms and corporate and treasury divisions, face significant challenges. To meet discerning customer expectations, banks need to consistently leverage contextual, realtime client data to deliver individualized, empathetic experiences and engagements. Increasing security threats and the pace of regulatory change can hurt brand reputation, hinder speed to market and increase costs. Content silos and fragmented information exchange can also impact operational imperatives, customer retention and competitive advantage.

Enhance interactions with customers, partners and employees

To remain competitive and deliver exceptional customer experiences and employee engagements, organizations need to be more agile and responsive. OpenText Banking solutions allow organizations to transform simple communications into meaningful conversations across customer-preferred channels. These solutions help extend engagements to digital channels, delivering experiences powered by realtime customer insights and analytics.

Success story



The combination of OpenText™ Content Suite Platform and OpenText™ Web Experience Management allows **CIBC Bank USA** to integrate its core business systems and improve content management to better serve employees and customers, maintain compliance and reduce cycle times. This improved digital collaboration has led to more personalized client communication and higher employee engagement.

“78 percent of digitally active banking respondents would bank with a tech firm, such as Amazon or Google. Banks unwilling or unable to adopt digitally-based services may lose customers to non-bank competitors.”

Accenture: Beyond Digital: How Can Banks Meet Customer Demands? 2018

Leverage data for meaningful insight

Artificial intelligence (AI) plays a key role in improving customer service, as well as retention, compliance, fraud detection and payment processing. OpenText Banking solutions help organizations manage and derive value from unstructured and structured data to better anticipate customer behavior and respond quickly to market shifts and regulatory requirements. By leveraging data to ask the right questions, uncover relevant insights and effectively predict trends, Financial Services institutions can make better decisions, reduce risk and increase customer trust.

Success story



Westpac Banking Corporation needs to store, transform, analyze and report on data quickly and easily. The **OpenText™ Magellan™ Analytics Suite** enables the bank to enhance data analytics and reporting for better regulatory information management and improved support for its business users.

Improve operations to better serve customers

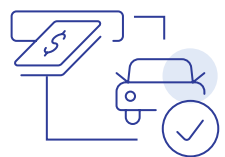
Banks are faced with continuous pressure to deliver excellent internal and external experiences at a lower cost. OpenText Banking solutions optimize processes and controls by unifying and securely managing enterprise content. As a result, they can take advantage of information to drive business value, minimizing the cost of managing data and mitigating legal and business risk. Additionally, increasing data quality by eliminating manual processes helps organizations focus on creating a customer-centric, ultra-responsive environment.

Enhance information exchange

Simplifying B2B complexities accelerates time to value and reduces cost. OpenText Banking solutions deliver a seamless, secure information flow to better manage day-to-day data exchanges and improve business process optimization. With end-to-end workflow processing and transparency, organizations can automate key business flows in securities, funds and cash processing.

Workflow productivity is further enhanced with cloud-based or on-premises faxing, generating additional cost savings, improved compliance and enhanced security.

Success story



Royal Bank of Canada wanted to create a secure commerce environment to improve transaction visibility and reduce labor-intensive, month-end reconciliations for its RBC Automotive Finance Group, which supports automobile dealers and rental car companies. **OpenText™ B2B Managed Services** delivers supply-chain transparency to support same-day financing processes and enhanced data integrity, boosting efficiencies and cost control for the bank's financing services.

OpenText stands apart

OpenText is trusted by 17 of the top 25 global Financial Services organizations, as well as 100 percent of the Fortune 500 diversified Financial Services firms and Fortune 500 commercial banks. Backed by a long history of working with the Banking industry, the OpenText portfolio helps digitize and transform operations, delivers B2B integration services and reduces the burden of compliance and security.

Banking solutions

Compliance and risk

Investigate and secure potential risks

[OpenText™ Security solutions](#)

Manage information flows across the organization

[OpenText™ Content Suite Platform](#)

Defensibly dispose of outdated information

[OpenText™ Records Management](#)

Decommission applications to reduce risk

[OpenText™ InfoArchive](#)

Maintain a single, secure archive in the cloud, on-premises or as a hybrid

[OpenText™ Archive Center](#)

Manage data cost-efficiently and securely

[OpenText™ Archiving and Document Access for SAP® Solutions Cloud Edition](#)

Sales and marketing

Create compelling, meaningful customer communications

[OpenText™ Exstream™ for Financial Services](#)

Drive exceptional, personalized online experiences

[OpenText™ Web Experience Management](#)

Improve customer satisfaction while reducing costs

[OpenText™ Analytics for Banking](#)

Anticipate customer behavior and spur investment

[OpenText™ Analytics for Wealth Management](#)

Operations

Automate manual processes, reduce costs and improve data quality

[OpenText™ Intelligent Capture](#)

Corporate IT

Optimize management of B2B data exchange and integration

[OpenText™ B2B Managed Services](#)

Enable secure faxing across the organization

[OpenText™ RightFax™](#)

Reduce fax costs while improving productivity

[OpenText™ Fax2Mail™](#)

Simplify on-premises fax deployment

[OpenText™ RightFax™ Connect](#)

Enable end-to-end processing workflow

[OpenText Straight Through Processing for Securities](#)

Coordinate complex data flows from a variety of data sources

[OpenText™ Business Network for Financial Services](#)

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