Supercharge Financial Services
Maximize market and product investments

Embrace strategic guidance and market education

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Ventana Research: Who We Are

About Us: We are a market advisory and research services firm in the technology industry.

Vision: To illuminate the value of technology through our unique insights.

Mission: We pride ourselves on delivering uniquely insightful independent research and services through a tailored, trusted and empathic client experience.

Advocacy: We stand behind equality, diversity and inclusion that is a human right for everyone.


20 Years Strong
800+ Technology Vendors in Coverage
100k Community Members

Business Technology
Experience Expertise Research
Organizations
Technology Suppliers

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The Ventana eXperience Difference

**Commitment**
We ensure our clients’ success by dedicating ourselves to provide the highest level of excellence in a reliable and teamwork-based approach.

**Experience**
We deliver a superior client experience using a high-touch and proactive engagement approach with a world-class team dedicated to our values.

**Expertise**
We have decades of experience in our subject-matter expertise and market research provided through our analyst and product team.

**Digital**
We offer a digital first approach to our community with on-demand access to a client portal for flexible self-service access to market insights and team.

**Comprehensive**
We provide a portfolio of connected Consulting, Advisory, Research, and Education (CARE) products that are tailored to meet our clients’ needs.
Ventana Research Community of Educational Content

- **Community**: A digital environment of 100k members gaining value from thousands of educational insights in many mediums and types of education and research.

- **Analyst, Industry & Market Perspectives**: Our subject matter and firm authored written and presented insights on topics and vendors guide path on use of technology.

- **Educational Insights**: Continuous publishing of research perspectives, white papers and presentations on the technology industry.

- **Market Research Insights**: Library of market research insights in form of reports, insights and best practices on technology and vendors.
Ventana Research: Market Research Excellence

- **Market Agenda**: We provide an annual and continuous plan to our research direction.
- **Analyst, Industry & Market Perspectives**: Firm and subject matter authored written or presented insights on topics and vendors.
- **Benchmark Research**: Continuous in-depth primary research on market and trends in over 25 topical areas of focus.
- **Dynamic Insights**: Continuous self-service research providing digital guidance to participants for their potential actions.
- **Value Indexes**: In depth vendor and product research built on an RFI/RFP format that categorizes and ranks technology vendors.
Our Areas of Financial Services Industry Expertise

Our areas of expertise help financial services organizations examine how to innovate and transform their organization and processes.

- Analytics
- Data
- Customer Experience
- Digital Business
- Digital Technology
- Human Capital Management
- Marketing
- Office of Finance
- Operations and Supply Chain
- Office of Revenue
Expertise Alignment to Financial Services

**Marketing**
Digital experiences and engagement strategies ensure market growth.

**Office of Revenue**
Optimal commerce and channel strategies require applications for achieving outcomes.

**Customer Experience**
The processes and applications that streamline customer journey and lifecycle of engagement.

**Services**
Digital experiences and services with information to support enterprise strategy to engage customers.

**Operations and Demand Chain**
Demand driven service chains require service and planning application investments.

**Office of Finance**
Proper fiscal governance requires finance and ERP investments.

**Human Capital Management**
Effective use of people requires investment into applications and technology for people and workforce.

**Digital Technology**

**Digital Business**

**Business Outcomes**

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Financial Services

Industry Assertion

By 2024, one-half of financial services organizations will have taken steps to optimize the customer experience with an intelligent and conversational self-service environment.

Keith Dawson
VP & Research Director

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The need for financial services institutions to modernize their digital business and computing environment requires business and technology investments that can innovate and streamline processes. To ensure your digital effectiveness requires customer experiences that are engaging and rewarding. Utilizing digital technology like analytics and AI can realize a path to great sophistication. Applications for its workforce and human capital management in cloud computing to achieve its objectives.
Challenges For Financial Services Industry

1. Portfolio of technology investments not modernized
2. Effectiveness in digital automation and workflows
3. Modernization of processes to reach efficiency levels
4. Differentiated subscription products as digital services
5. Expected self-service digital customer experiences
1. The Customer Experience and Engagement Mandate
   - Evolving consumer expectations for digital efficiency in the personalization of any interactions to ensure loyalty and profitability.

2. Corporate Sustainability and ESG Transparency
   - Environmental, social and governance (ESG) are vitally important to customers, workforce and stakeholders to minimize the carbon footprint.

3. Remote and Hybrid Workplace Reality
   - Addressing employee expectations, and worker retention, from global pandemic, to a work-from-home structure for retention.
Financial Services

Industry Assertion

Through 2025, one-quarter of organizations in financial services will lack effective collaboration for digital business and will reassess the communications and interactions with workforce and constituents.

Mark Smith
CEO & Chief Research Officer
Technology Trends in Financial Services

1. Customer Digital eXperience Platforms
   - The personalization of the customer experience for engagement across marketing, contact centers in digital and mobile banking to guide interactions no matter the digital channel.

2. Analytics and Augmented Decision Intelligence
   - Support workforce and streamline processes with personalized set of insights with key indicators and metrics to collaborate and guide actions and decisions using machine learning to monitor and act.

3. Robotic Automation and Digital Process Workflows
   - Interconnect departments and systems in real-time intelligent automation across applications spanning legacy systems and cloud computing applications to respond and act immediately.
Our Portfolio of Services for Industries

We provide a portfolio of services called CARE designed to help organizations in the following areas: helping with their business technology needs across processes, guiding evaluation and selection activities related to the technology industry and assist specific investments in technology industry to reach full market potential.

**Consulting**

- **Strategy & Planning**: Consulting where we deliver expert guidance with our experience, expertise and market research through workshops and assessments for better business outcomes.

**Advisory**

- **Decisions & Guidance**: Advisory through our proactive and informed expert advice and insights for optimization of decisions through our Ventana On-Demand service designed for value every month of the year.

**Research**

- **Observations & Insights**: Research enables insights from our industry analyst team and market research with our Benchmark Research, Dynamic Insights and Value Index research products that provide facts for decisions.

**Education**

- **Knowledge & Power**: Education in a range of business, technology and vertical industry topics through our publishing of digital content in mediums and styles for impactful insights across an entire organization.
Example Financial Services Industry Education
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