



VENTANA
RESEARCH

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.

Values: **Excellence. Independence. Innovation.**
Reliability. Research. Teamwork.

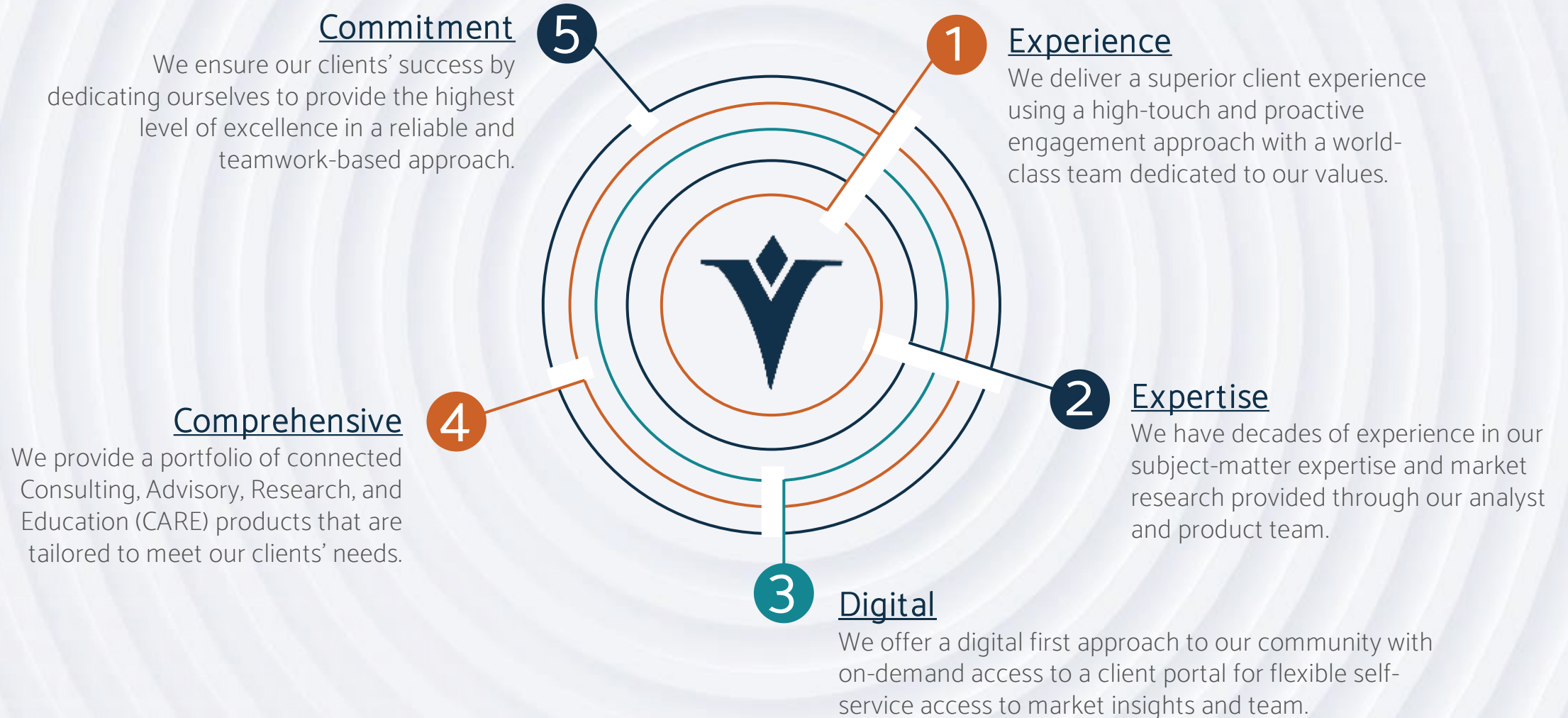
20
Years
Strong

800+
Technology
Vendors in Coverage

100k
Community
Members



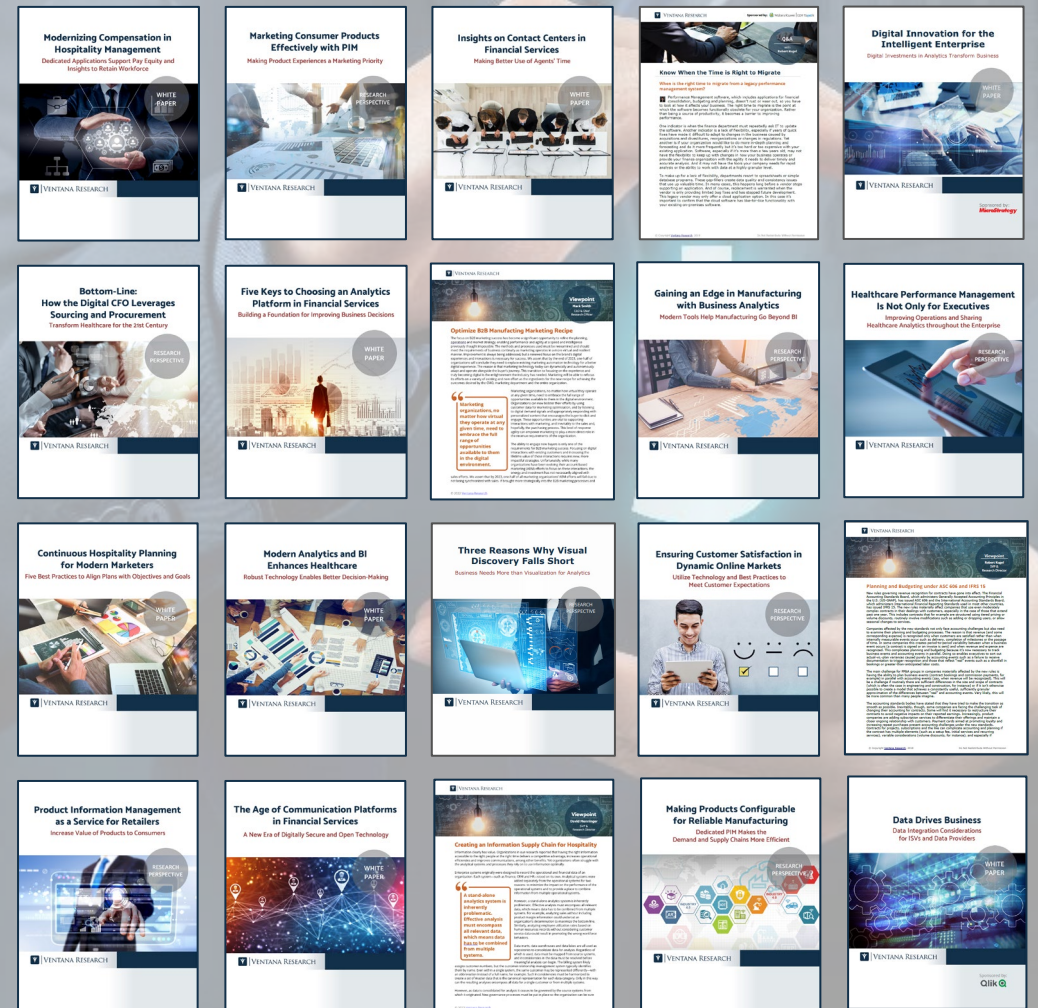
The Ventana eXperience Difference



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.

Community of Educational Content



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

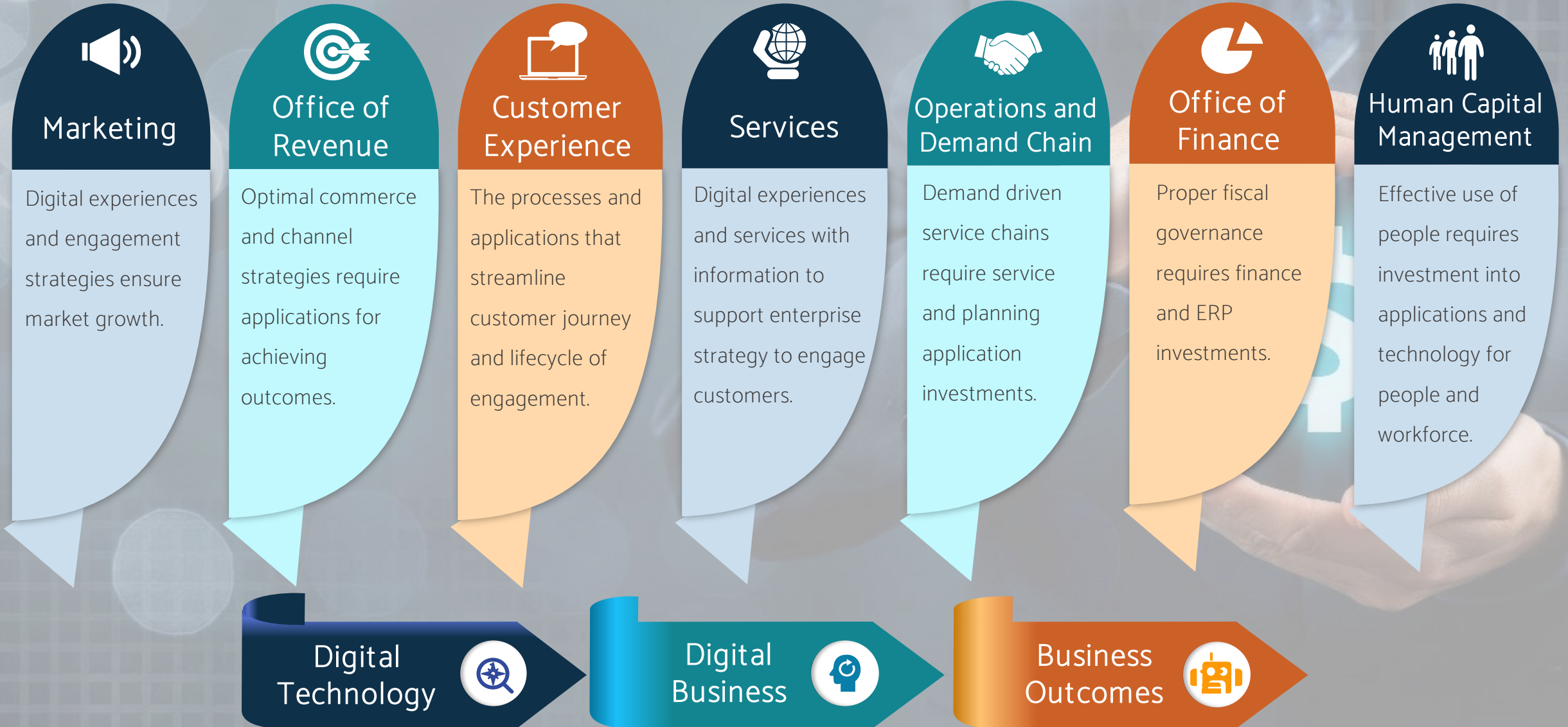
Marketing

Office of Finance

Operations and
Supply Chain

Office of Revenue

Expertise Alignment to Financial Services



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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Financial Services Industry

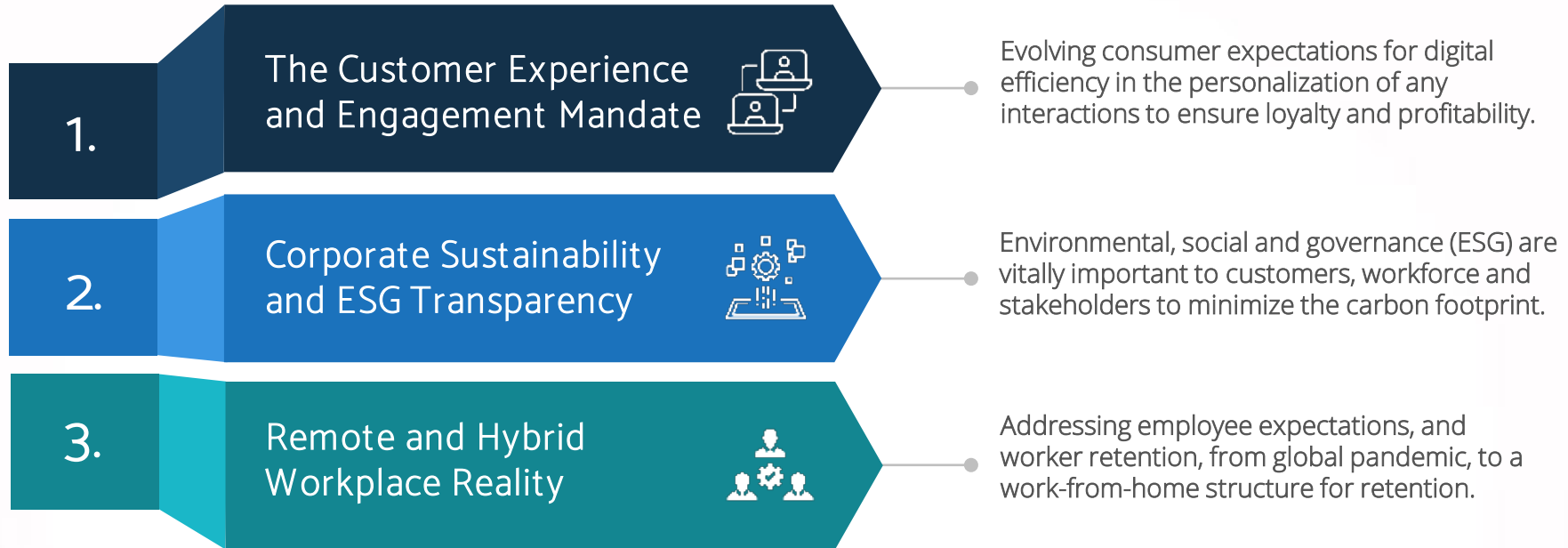
The need for financial services institutions to modernize their digital business and computing environment requires business and technology investments that can innovate and streamline processes. To ensure your digital effectiveness requires customer experiences that are engaging and rewarding. Utilizing 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

Business Trends in Financial Services Industry



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



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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



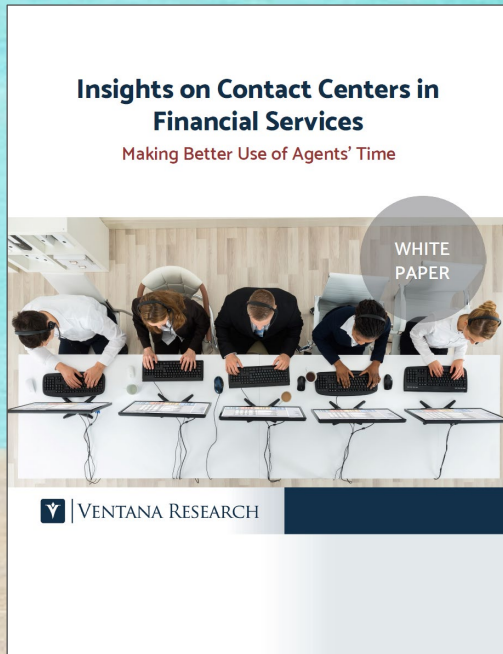
Knowledge & Power

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

Insights on Contact Centers in Financial Services
Making Better Use of Agents' Time

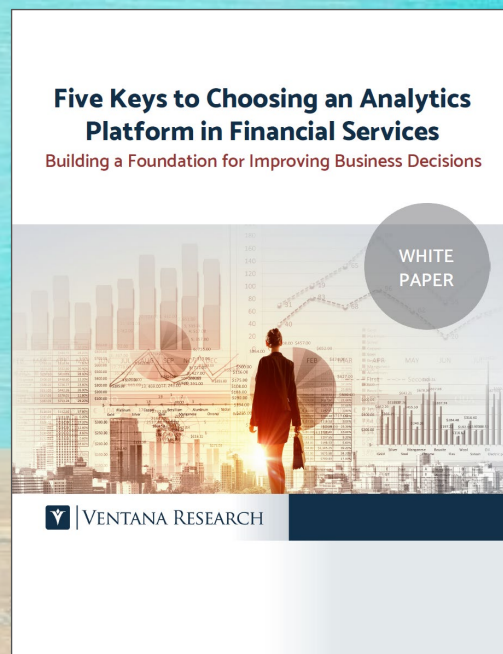
WHITE PAPER



VENTANA RESEARCH

Five Keys to Choosing an Analytics Platform in Financial Services
Building a Foundation for Improving Business Decisions

WHITE PAPER



VENTANA RESEARCH

The Age of Communication Platforms in Financial Services
A New Era of Digitally Secure and Open Technology

WHITE PAPER



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