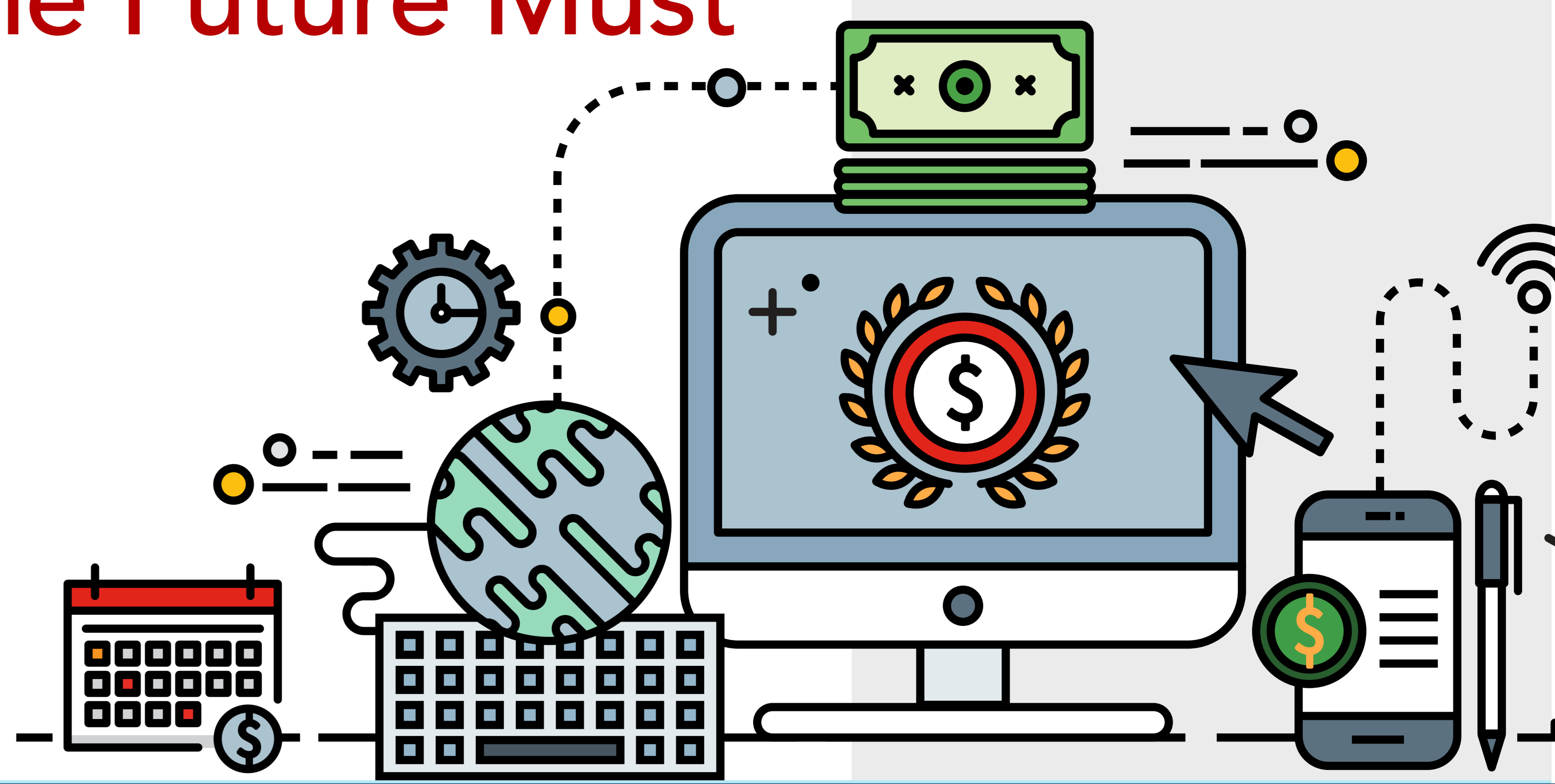


# The Financial Services of the Future Must **BANK on Technology**

Whether your financial services organization is developing personalized customer experiences using AI, identifying partnership opportunities with competitive tech platforms to build new products, or establishing an agile, tech-savvy work culture, the infusion of technology into financial products will be a key component of your future business strategy.



## EMERGING TECHNOLOGIES ARE CHANGING THE INDUSTRY



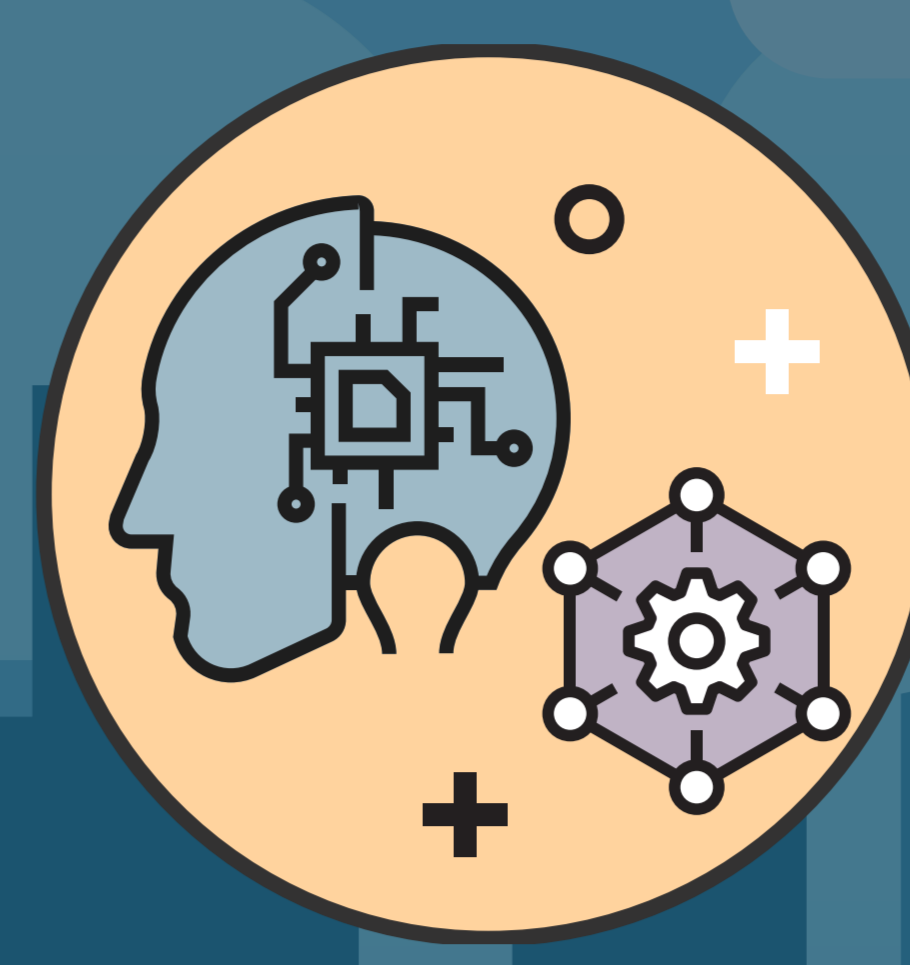
Open Banking



Guaranteed Security



Hybrid Cloud Model



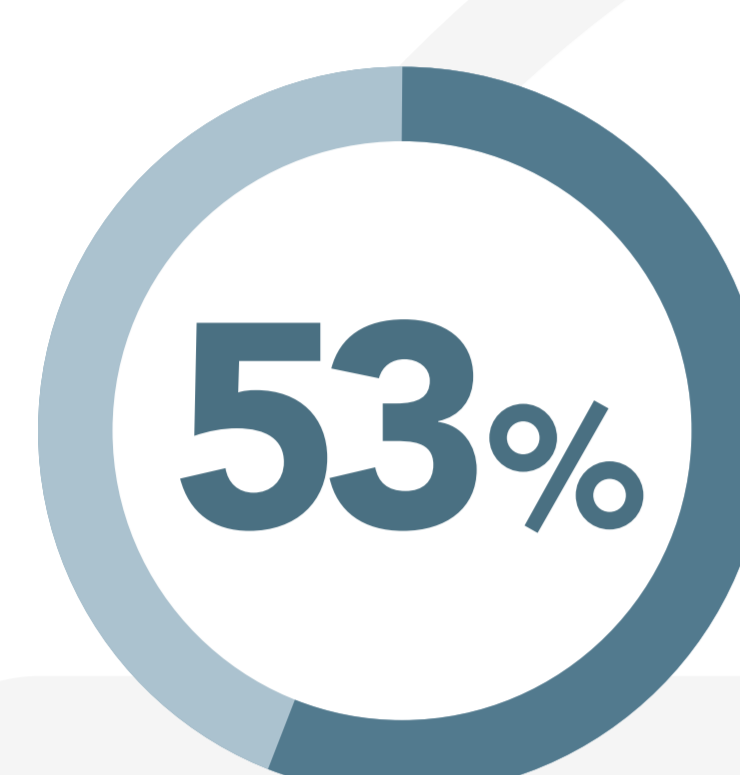
Robotic Process Automation (RPA)



Video Banking

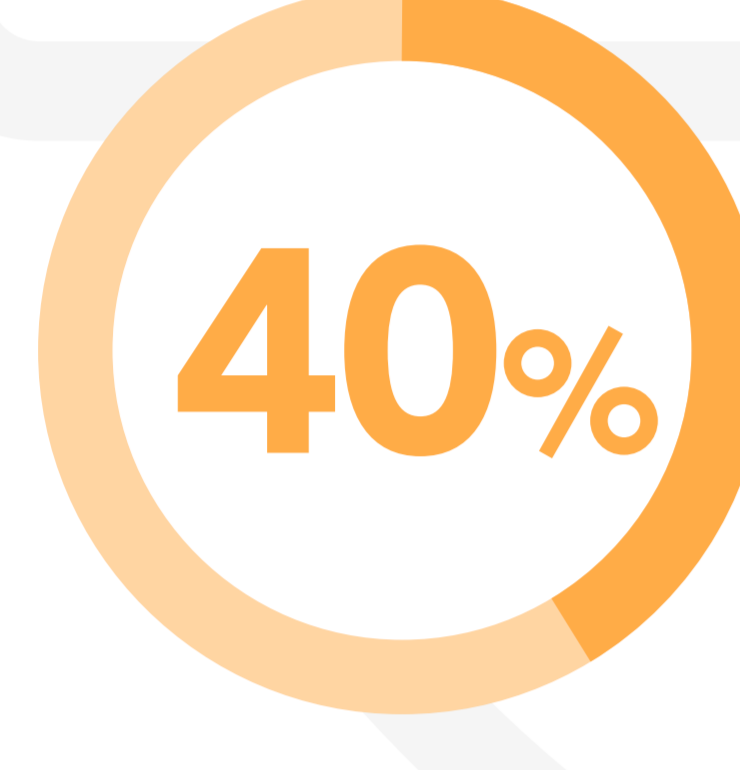
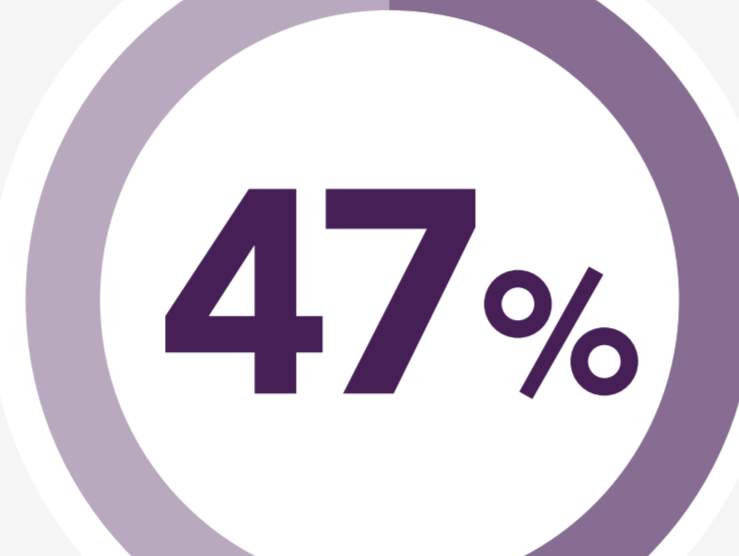
### OPEN BANKING

New Financial Ecosystem Designed to Attract and Retain



53% of **customers** want a seamless, omnichannel banking experience.<sup>1</sup>

47% of **financial institutions** are now embracing open banking initiatives.<sup>2</sup>



40% of **consumers** say they use credit cards primarily for multi-partner reward programs.<sup>2</sup>

1. Data Source: Accenture Global Financial Services Consumer Study, 2019  
2. Data Source: FS State of Application Services, 2020

New disruptive financial technologies, services, and business models are emerging at an extraordinary pace. To survive and thrive, financial institutions need to remain relevant through the development and adoption of new technologies.

### CYBERSECURITY

Business Priority for Financial Services

**300x**  
higher

Probability financial firms will experience cyber-attacks compared to other industries<sup>3</sup>

**80%**

Banks that increased their investment in technology to address cybersecurity in 2022<sup>4</sup>



**\$800M**  
each

Amount top US bank brands spent on cybersecurity in 2020<sup>5</sup>

3. Boston Consulting Group, 2019  
4. Data Source: American Bankers Association  
5. Tech Wire Asia

The digital environment continues to require more dynamism than traditional structures can deliver. In the face of constant change, a plan is still needed, but it must be continuously adapted and aligned to goals.

## Getting value on digital investments: mission critical for financial services



In 2023, executives plan to direct \$4.6 trillion into enterprise **IT spending**, a year-over-year increase of 5.1%.  
– Gartner



A triple squeeze of economic pressure, scarce and expensive technology talent, and ongoing supply challenges is heightening the need for tech investments to pay off.  
– Daniel Sanchez-Reina, Vice President and Analyst, Gartner

Planview **MAKES IT EASY to MAKE IT MASSIVE.** Modern enterprise software platform effortlessly gives financial organizations like yours, over-the-top competitive edge.

## Life-long customers. Compliance under control. A single platform for championing processes and people for winning results.



### Build a Predictable Plan

Prioritize strategic initiatives with ease; perform what-if analyses in minutes

RIGHT PRODUCTS, RIGHT TIME  
ADJUST AS MARKET EVOLVES  
CAPITALIZE ON NEW OPPORTUNITIES



### Reduce Costs

Minimize losses on failing projects by 10-30%

AUTOMATE PROCESSES  
QUICKLY SOLVE PROBLEMS  
MEET BUDGET REQUIREMENTS



### Engage Your People

Increase productivity by 10-35%

SHARED PURPOSE  
NEWFOUND TECH-SAVVY  
CULTURE



### Drive Growth, Enhance Risk Protection

Get to market 10-25% faster through increased data visibility

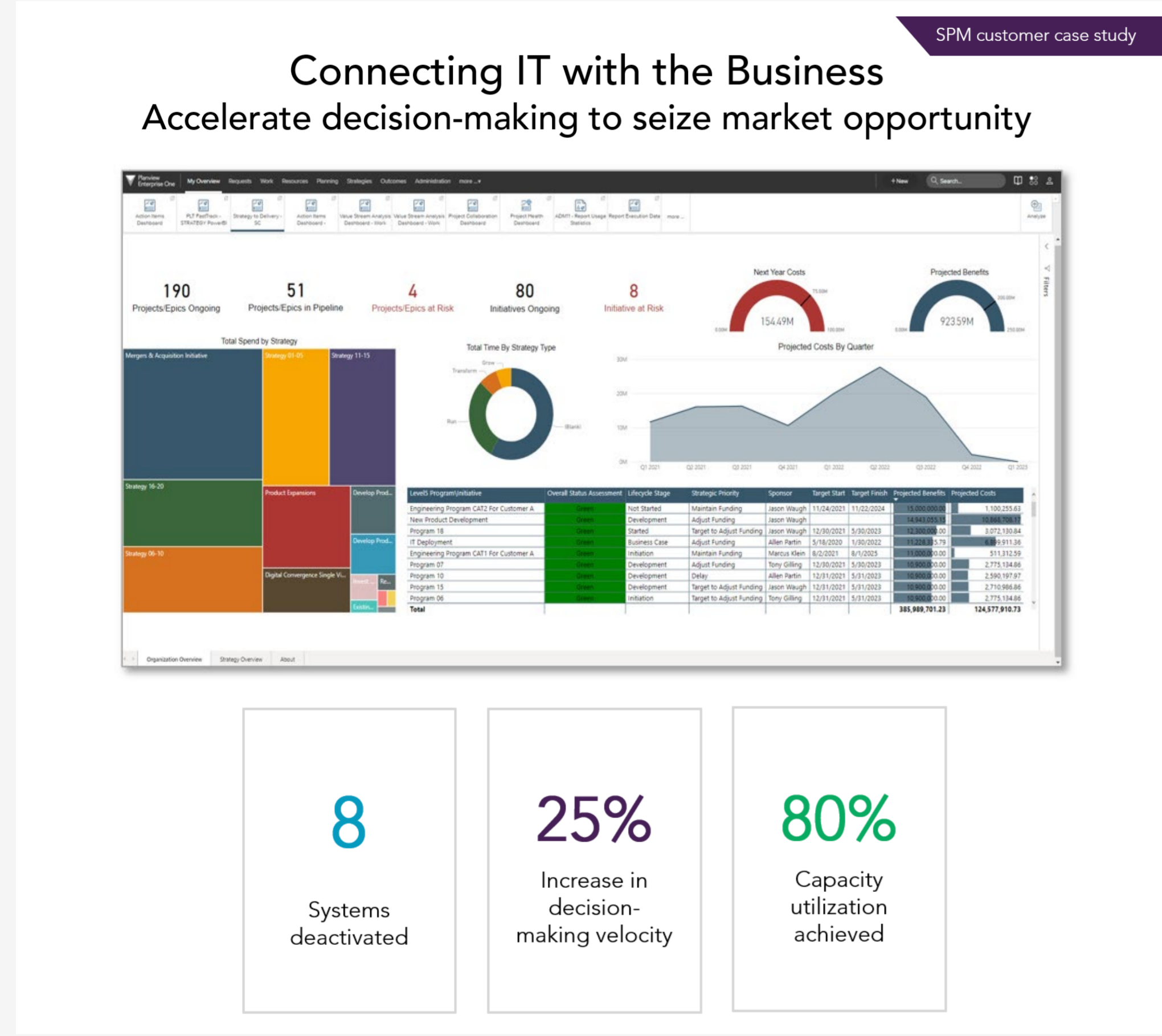
HOLISTIC VIEW  
BETTER INSIGHTS  
SMARTER DECISIONS



### Capture the Best Ideas, Ensure the Best Results!

CUSTOMER-CENTRIC IDEATION  
CONTINUOUS FEEDBACK  
INCREASED COMPETITIVENESS

## \$6 Billion Global Banking Customer sees results with Planview.



## Trusted by your peers

HSBC

CIBC

LLOYDS BANK

JPMORGAN CHASE & CO.

Commonwealth Bank of Australia

Fannie Mae

RBC

Santander

## Industry recognition

Leader in The Forrester Wave™: Strategic Portfolio Management Tools, Q1, 2022

FORRESTER

Leader in 2022 Gartner® Magic Quadrant™ for Enterprise Agile Planning Tools

Gartner

## BUILDING THE FUTURE OF CONNECTED WORK

See how Planview's Strategic Portfolio Management solution enables financial services organizations to become more agile and responsive.

Learn More