

OPTANIX FOR FINANCIAL SERVICES COMPANIES

DELIVER SEAMLESS CUSTOMER EXPERIENCES, LAUNCH NEW OFFERINGS AND PROTECT SENSITIVE DATA ACROSS EMERGING AND LEGACY TECHNOLOGIES ALIKE.

The financial services sector is evolving at a rapid pace, and as digital transformation takes hold, innovative new technologies such as blockchain and machine learning are driving even greater change. Those companies that leverage such technologies to introduce groundbreaking new services and business models stand to gain precious market share – those that lag behind run the risk of irrelevance.

Every new offering that a financial services company rolls out can impact the IT stack, and only the newest fintech startups have the luxury of avoiding legacy systems for their critical business systems. As a result, IT infrastructures become increasingly complex over time as they mix old and new technology, making them more prone to failure as the breadth of technology under management expands and gives way to tool sprawl and skill gaps. Nonetheless, IT operations teams are still expected to effectively

manage these complex environments while being asked to deliver on – or exceed – expected service levels at a lower cost.

And while technology can help improve customer engagement and trust in brands and offerings – which is essential in the financial services sector – it can also hinder that engagement and erode that trust when the technology in question does not meet expectations. Financial services companies that wish to deliver first-rate customer experiences can leverage Optanix to assure the performance and availability of their technology-based offerings – and to do so with the most secure approach possible.

SOLUTION BRIEF SYNOPSIS

This piece focuses on three areas heavily impacted by IT that are critical to the success of financial services firms and how Optanix can help firms navigate those areas with confidence:

- Digital transformation
- Customer experience
- Security

It follows with two case studies of financial services companies that have leveraged Optanix to achieve positive business outcomes.

DIGITAL TRANSFORMATION

LAUNCH INNOVATIVE OFFERINGS UNDERPINNED BY EMERGING TECHNOLOGIES WITH CONFIDENCE WHILE STILL SUSTAINING VITAL LEGACY SYSTEMS



The pace of digital transformation is accelerating for financial services companies as they deploy forward-looking technologies like blockchain, AI and machine learning to create new offerings and revenue streams. Such technologies require changes across the entire IT stack as companies must modernize their infrastructure, whether on-premise, in the cloud, or a hybrid of both.

While digital transformation is essential, most financial institutions cannot simply abandon all of their existing IT systems overnight. A massive internetwork of legacy systems is still needed to support the full range of critical business services, from ATMs to contact centers to mobile applications.

This creates a challenging scenario in which financial services firms must monitor and manage a diverse, growing collection of both legacy and emerging technologies. Further, as the number of technologies in an IT environment grows, so too

does the number of tools required to manage them – tools that are typically point-focused and poorly integrated, leading to inefficiencies that hinder IT operations efforts.

On top of that, it can be difficult to recruit and retain engineers with the skills and experience required to manage all of the technologies that comprise a financial firm’s complex IT environment – not to mention the need to continually train those engineers on new technologies. What’s more, IT operations management is a full-time job, but IT operations teams are still typically tasked with responsibilities outside of support delivery, and any time they spend troubleshooting issues is time not spent focused on strategic initiatives.

Financial services companies can confidently adopt leading-edge technologies to help them deliver innovative digital offerings without the need to expend internal

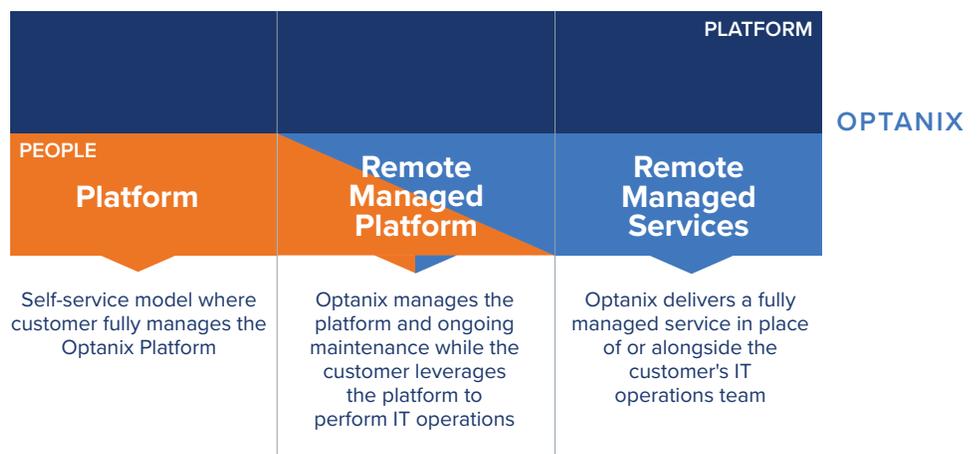
engineering resources to do so by leveraging Optanix Remote Management Services (RMS). The experienced personnel in the Optanix support center hold manufacturer and industry certifications in the technologies we support and receive continuous training as new products and versions become available, ensuring they are always ahead of the technology curve.

Additionally, financial firms can eliminate the overlapping functionality and data silos that arise from multiple, disparate monitoring tools by moving to the Optanix Platform. The Optanix Platform integrates a range of monitoring and management functionality into a single platform. This single platform assures business services across the largest hybrid networks, supporting traditional network and systems infrastructures integrated with the software-defined anything infrastructure of today in a seamless solution, and bridging the gap as new technology is deployed.

DEPLOYMENT MODELS

Flexible deployment options allow Optanix’s end users and partners to use the Optanix Platform to perform their own IT operations management or to augment their IT operations teams with Optanix’s service desk capabilities.

**PARTNER/
END USER**





CUSTOMER EXPERIENCE

STRENGTHEN CSAT BY ENSURING SEAMLESS CUSTOMER INTERACTIONS WITH TECHNOLOGY-BASED OFFERINGS

Today's consumers demand anytime, anywhere access from their financial institutions. When technology inhibits customer interactions, whether it's a hiccup in an online trade or a dropped customer support call, there can be a severe business impact as competitors today are only a click away.

Financial institutions can assure the performance and availability of their critical business services with the proactive 24x7 ITIL incident management and remediation services included in Optanix RMS. Through Optanix RMS, the Optanix Platform proactively detects, validates and diagnoses incidents and alerts the Optanix support center – with a mean time to notify (MTTN) of just 33 seconds – giving our team the detailed information they need to remediate issues before they impact the customer experience.

Financial firms can further improve CSAT with a range of other Optanix Platform features aimed at ensuring positive customer experiences in a digital world. Whether used to power Optanix RMS or as a standalone solution, the Optanix Platform works by providing full-stack monitoring

– with end-to-end management of the IT infrastructure and services – that powers advanced analytics and root cause analysis. These features combine to predictively and proactively detect new and impending problems and quickly analyze them from multiple angles to find their true cause and provide actionable intelligence.

Firms can also ensure the problems most damaging to their business are addressed quickly with the Optanix Platform's business service monitoring and prioritization capabilities, which prioritize root cause problems based on the criticality of the impacted business services. Streamlined remediation and management workflows reduce mean time to repair (MTTR) of those problems through a combination of automation and secure, multi-tenant remote access that enables experts to rapidly solve problems.

CUSTOMER EXPERIENCE SUCCESS STORY

When a payment processing company faced continuous challenges with delivery of customer care due to performance and availability issues with its globally distributed network of more than a dozen contact centers, they looked to Optanix for assistance.

TURN TO PAGE FIVE TO LEARN HOW OPTANIX HELPED THIS CUSTOMER GET THEIR CRITICAL CUSTOMER CARE CHANNEL BACK ON TRACK.



SECURITY

PROTECT SENSITIVE CUSTOMER DATA BY KEEPING SECURITY AT THE FOREFRONT OF ALL IT OPERATIONS INITIATIVES

As any number of financial services companies can attest, falling victim to a cyberattack can be catastrophic for financial firms. The fallout from such attacks typically involves lawsuits brought by those customers whose sensitive personal and financial information has been compromised and erosion of overall consumer trust in the company.

To protect their customers and their business, it's essential for financial services companies to do everything they can to manage risk and reduce vulnerabilities. While a financial firm's security strategy should incorporate a wide range of tactics – including measures such as mandating two-factor authentication for customers accessing online accounts and adopting biometrics to replace traditional passwords – one of the most effective steps they can take is to select an IT operations provider with verified security credentials.

The security of our customers' networks and business assets is a critical component of Optanix's service model. This is evidenced by the fact that Optanix RMS is backed by the most stringent

security credentials in the industry, including ISO 27001, SSAE 18 Type II and HIPAA. These credentials are awarded by independent agencies that routinely audit our security practices.

While Optanix engineering teams follow best practices to maintain a secure environment, the Optanix Platform was also designed with security top of mind. For starters, the platform is installed on the customer's network, within their firewall, and configured to comply with their security policies. Thanks to this approach, no sensitive data ever leaves the customer site or is mixed with that of other Optanix customers. Further, offsite support teams only access customers' platforms via secure VPN connections, and the Optanix Platform is routinely updated to protect against potential threats.



FINANCIAL SERVICES SUCCESS STORIES



LARGE PAYMENT PROCESSING COMPANY REDUCES INCIDENT VOLUMES ACROSS GLOBAL CUSTOMER SERVICE INFRASTRUCTURE BY 99.8%

CUSTOMER KUDOS

The customer's global head of operations has consistently praised Optanix's comprehensive monitoring capabilities, proactive incident remediation and skilled support center staff.

PAYMENT PROCESSOR

When a leader in payment processing technology and solutions faced continuous challenges with delivery of customer care due to performance and availability issues with its globally distributed network of more than a dozen contact centers, they put out a request for proposal (RFP) for managed services.

An Optanix partner ultimately won that RFP and displaced the incumbent managed service provider with Optanix RMS. The customer's decision was based on the fact that its global head of networks had previously used the Optanix Platform – which powers Optanix RMS – at another major financial institution where he grew to trust the platform's capabilities.

At go-live, Optanix managed more than 3,800 endpoints for the customer, along with 28 Cisco Unified Contact Center servers, 16 Cisco Unified Communications servers, supporting network infrastructure, and numerous other systems and applications. After deployment, Optanix identified issues in the customer's infrastructure that were not under management, ultimately leading to the customer requesting Optanix expand the service to cover 200 additional network devices.

Since deployment, the Optanix Platform has reduced the customer's incident volumes by 99.8%, ensuring Optanix engineers spend time working on real issues rather than drowning in noise. Additionally, the customer's global head of operations has consistently praised Optanix's comprehensive monitoring capabilities, proactive incident remediation and skilled support center staff.

FINANCIAL SERVICES SUCCESS STORIES



LEADING PAYMENT SERVICE PROVIDER
ENSURES RELIABLE NETWORK
CONNECTIVITY ACROSS MORE THAN
20 COUNTRIES

CUSTOMER KUDOS

According to the customer,
"This is the best NOC we have ever had.
Optanix is doing a really great job."

PAYMENT SERVICE PROVIDER

A strategic move to spin one business unit of an organization off into a new company resulted in an urgent need for that company to implement IT services to support its new global network. Lacking the experienced staff needed to manage its mission-critical network infrastructure itself, that new company – which is now one of the world's largest payment service providers – brought in Optanix to manage its data network.

The company chose Optanix because of the comprehensive multi-vendor device coverage offered by Optanix RMS and the Optanix Platform, and because Optanix engineers could quickly add additional device support by creating intelligent rulesets within the platform.

At go-live, the Optanix Platform managed nearly 600 devices across 27 company locations. Those numbers rapidly expanded to more than 1,100 devices in 59 locations – proof of the success of the service engagement. According to the customer, "This is the best NOC we have ever had. Optanix is doing a really great job."

Since deployment, the Optanix Platform has reduced the customer's incident volume by 97% and the Optanix Support Center has proactively responded to 94.4% of incidents without the customer having to report them.

About Optanix

Optanix is the leader in intelligent business service assurance. The Optanix Platform delivers predictive and proactive performance and availability management across hybrid infrastructures, with a focus on real-time communications use-cases. It is available as a standalone solution or as the engine behind Optanix's managed service offerings.

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