

UNISYS

New Bank
Employee Desktop

Antonio Subirana
Global Financial Services
Unisys

 Microsoft®
**Office SharePoint®
Server 2007**

Proven Industry Expertise

UNISYS

**\$5.82 billion
Revenue**

**200+
Newspapers**

**4,000
Customers**

**81%
Services**

**200+
Airlines**

**100+
Airports**

**100
Countries**

**53%
Global**

**1500+
Government Agencies**

**2200+
Financial Services
Customers**

**36,000
Employees**

**90+
Telecom Companies**

Solutions Alliance Credentials

Select Microsoft Awards and Certifications

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2005

- Microsoft Gold Certified Partner in 60 Global Locations
- Microsoft Winning Customers Award for High Performance Computing
- Microsoft Top Regional Partner Award in Customer Satisfaction



2004

- Microsoft Winning Customers Award for Unix Migration
- Winner: Microsoft Germany Design Contest, Client: DaimlerChrysler
- SQL Server Magazine, Readers Choice Award, Best SQL Boot Camp



2003

- Winter Group Top 10 OLTP Workload Award – 3,600 tps
- Association of Strategic Alliance Professionals
Best Practices, Field Engagement



2002

- Microsoft Partner of the Year Award

1999

- Microsoft Industry Solution Award for
Financial Services: Retail Banking



Bank branch

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- The branch is the main engine for the growing of the Banks
But, it must evolve with the customers
- After a cost reduction period, Banks must grow the business doing an employee efficiency improvement

To improve the employee efficiency, it is necessary to give them the appropriate tools

3D-VE approach

Strategy

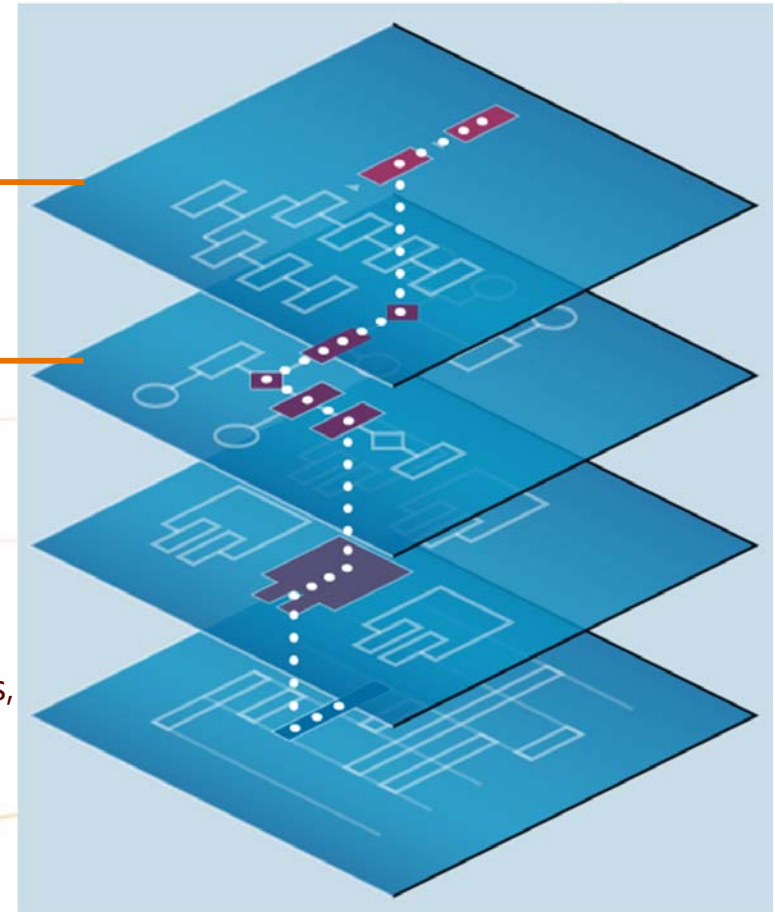
- **Develop an strategy for the branch channel**

- > Branch as a main sales channel into a multichannel environment
- > Transition to a sales culture
- > Branch model orientated to a sales, not to transaction
- > Align human resources as strategy to sell products and services

Process

- **Improve operational efficiency**

- > Analyse actual business process and identify inefficiencies, redesign process, simplify and automat.
- > Implement cross selling
- > Capitalize image capture and management
- > Move high volume and low value transactions to other channels



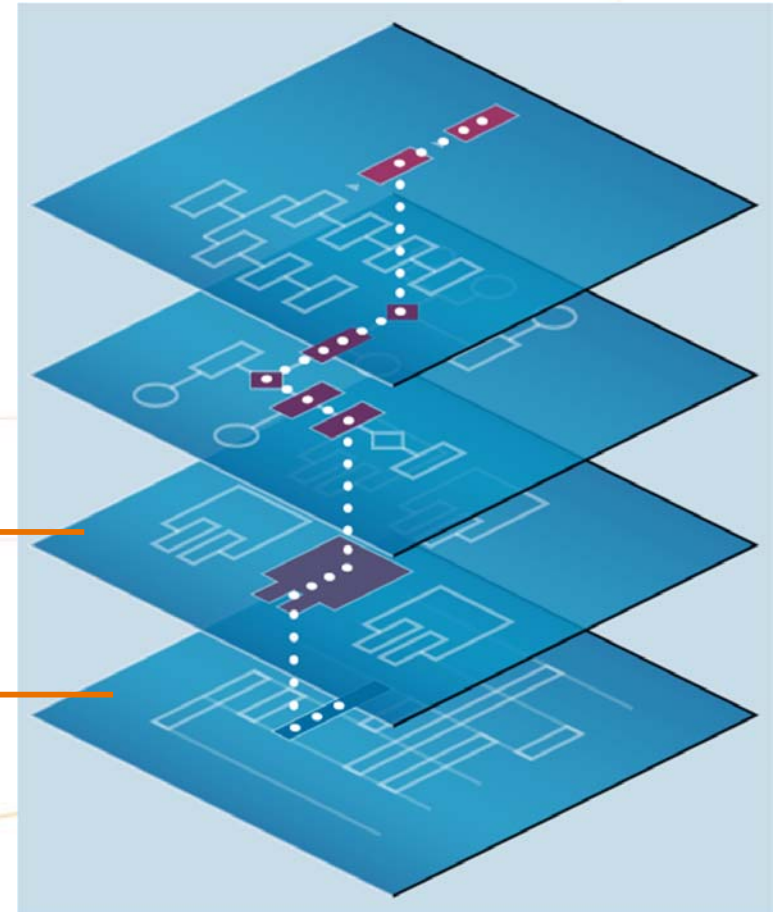
3D-VE approach (cont.)

Applications

- Implement an image and workflow system
- Empower client and client contact information
- Implement sales support tools
- Integrate all applications
- Channel integration, with an effective, consistent and uniform communication between them

Infrastructure

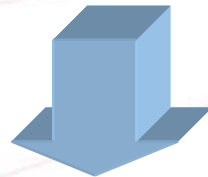
- IT infrastructure to support an integrated multichannel architecture
- To eliminate inefficiencies in non structured applications
- Cost reduction implementing a centralized infrastructure and eliminating branch servers
- IT architecture to integrate front office systems with the corporate systems



Objective

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- Improve functionality and productivity of the workstation
- An integrated access approach to the applications
- Empower the employee sales activity
- Lead the employees through the sales process
- Improve the service quality



“Employee efficiency improvement”

Portal concept

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- Easy, unified and personalized access to all information
- Application integration
- Global and quick view of the employee daily tasks
- Customer view
- Cross selling
- Process optimisation

*The first to open
and the last to close*

Portal concept benefits

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- Clarity, agility and time reduction
- Eliminate complexity and reduce operation errors
- Concentrate in the most important and make priorities
- Improve customer contact and helps in the sales process
- Maximize the sales opportunities and offer added value
- Reduce time and cost

Potential results

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Improve product and services distribution network

Concept design

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Example of a concept design

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Customer demographic information

Unified, Real-Time Customer Profile

Customer alerts

Customer Financial information

Same components reused in various roles

Customer-Centric Cross Sells

Most customer frequently operations

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Mrs BRIGITTE CAZEUX PHONE :

at live in advisable address

Born on : 05/06/1955

Status: M

Professi

21, rue Pasteur

0612524513

75016 PARIS

Email: CAZEAX@essai.com

Last visit:

ALERTS

Riske Opportunities Exploitation

Potential: [Bar Chart]

Risk: [Bar Chart]

Acquired points: 54

MEETING TO COME

POINTS TO COVER

RECOMMENDED PRODUCTS

PRODUCTS

INSURANCES	4500,00 EUR
DEPOSIT	-2596,08 EUR
CREDIT CARD	-2810,20EUR
CHEQUE	214,12EUR
SAVINGS	30176,72 EUR
SERVICES	1800,00 EUR
TITLES	79 481,73 EUR

OPERATIONS - CHEQUE

Balance

Enquire on cheque number

Enquire on cheque

Enquire on stopped cheque

Automatic renewal opening

Change agreement

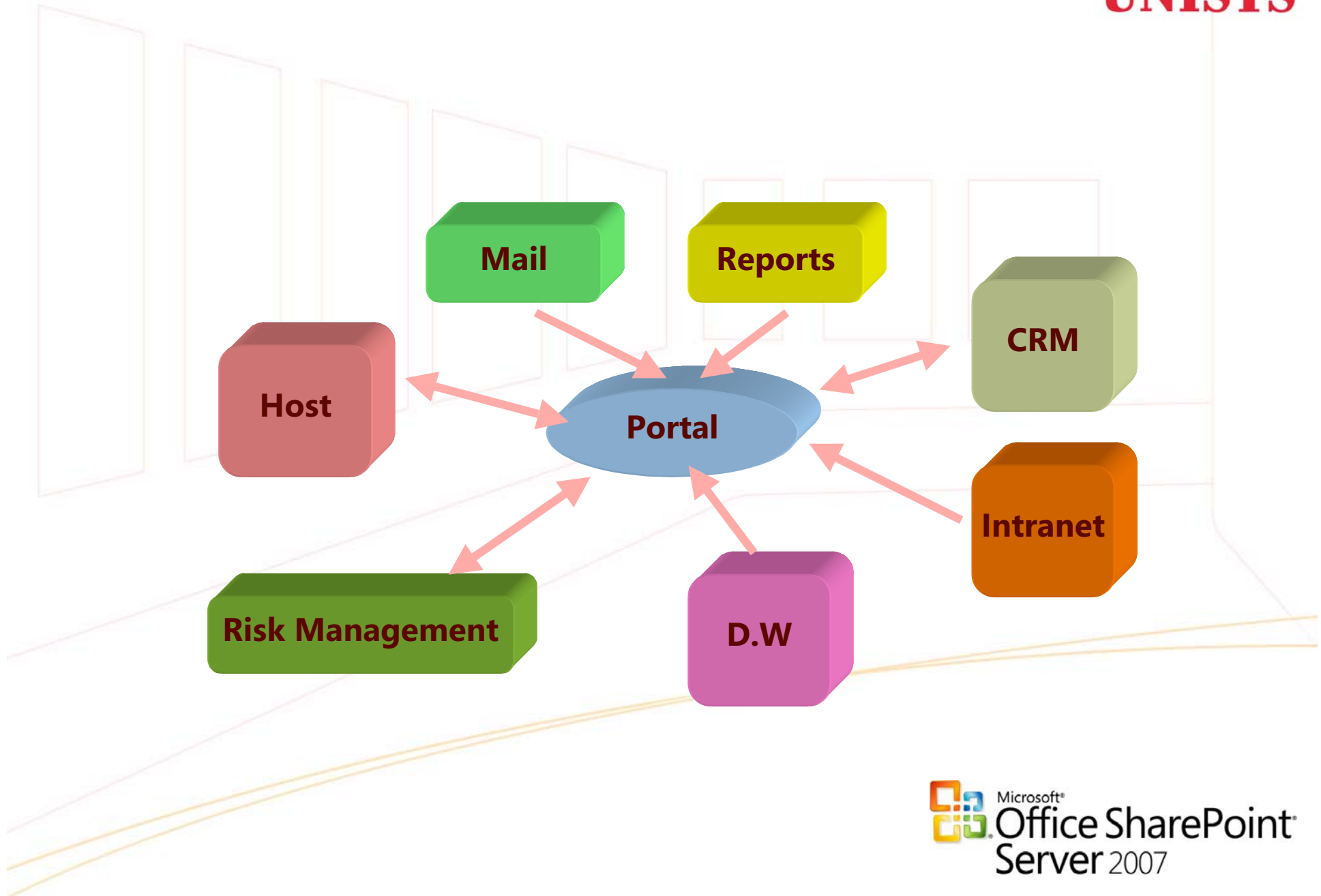
Cancel cheque

Variance

Manage rejected cheques

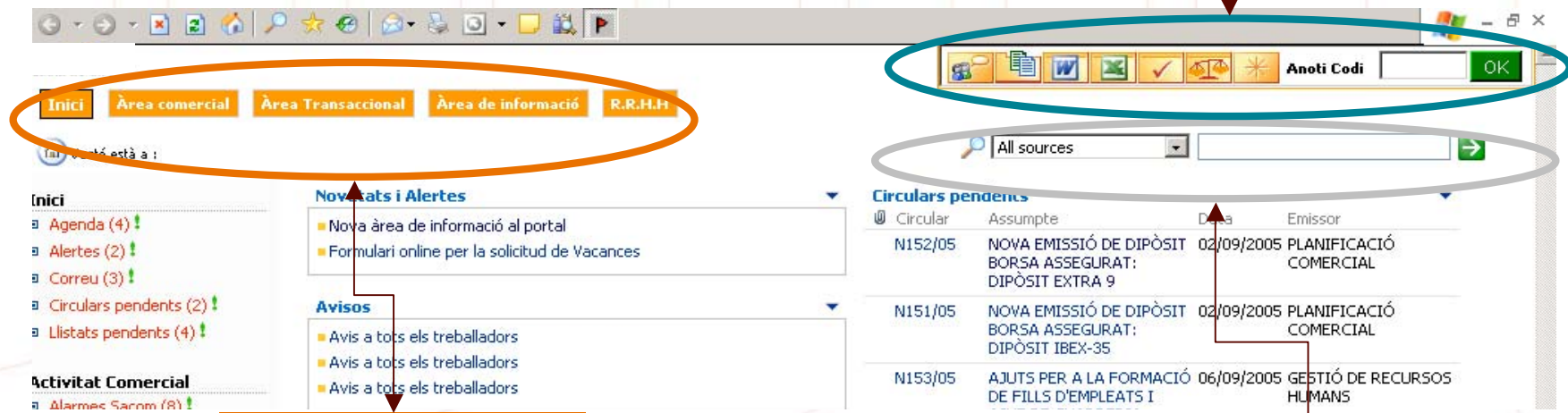
Unified view

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Portal structure

Direct buttons and direct transaction access



Main work areas:

- Init
- Sales
- Transactional
- Information
- Employee

Search tool to all Information Systems

Initial page

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Inici **Àrea comercial** **Àrea Transaccional** **Àrea de informació** **R.R.H.H**

Vosté està a :

Inici

- Agenda (4) ↓
- Correu (3) ↓
- Circulars pendents (4) ↓
- Llistats pendents (5) ↓

Activitat Comercial

- Alarmes Sacom (10) ↓
- Expedients pendents (7) ↓

Altres Webs

- Oficin@ 24 hores ↓

Avisos

A partir de demà **dia 29**, es poden contractar els nous **Plans de Pensions Garantits**.

Novetats

- Nova àrea de informació al portal
- Formulari online per la sol·licitud de Vacances
- Actualitzades tarifes de préstecs

Campanyes

Pugi a un pla d'alta rendibilitat

+2% regal

[Altres campanyes en curs](#)

Circulars pendents

Circular	Assumpte	Data	Emissor
N152/05	NOVA EMISSIÓ DE DIPÒSIT BORSA ASSEGU RAT: DIPÒSIT EXTRA 9	02/09/2005	PLANIFICACIÓ COMERCIAL
N151/05	NOVA EMISSIÓ DE DIPÒSIT BORSA ASSEGU RAT: DIPÒSIT IBEX-35	02/09/2005	PLANIFICACIÓ COMERCIAL
N153/05	AJUTS PER A LA FORMACIÓ DE FILLS D'EMPLEATS I AJUT DE GUARDERIA	06/09/2005	GESTIÓ DE RECURSOS HUMANS

Llistats

Data	Format	Referència	Pàg.
30/08/2005	ANOTACIONS D'ITO	E011/EXP	1
30/08/2005	COMPROVACIO FEINES DIARIES	E004/EXP	1
30/08/2005	MAJOR I CRITICALS D'ITO	E002/EXP	1
30/08/2005	CONTROL DE COPIES DE DATAPROTECTOR	E022/EXP	1
30/08/2005	LLISTAT ERRORS AUTOSYS	SENSE	3

Sitos de confianza

Application view into the Portal area

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The screenshot displays a web application interface with a navigation menu at the top: **Inici**, **Àrea comercial**, **Àrea Transaccional**, **Àrea de informació**, **Alarmes**, and **R.R.H.H**. Below the menu, there is a search bar with the text "This topic" and a search icon. The main content area is titled "Alarms Sacom" and contains two tabs: "Alarms diàries i aperiòdiques" (selected) and "Alarms mensuals".

Descripció	Nº alari	Nombre	Tipus de selecció	Moneda
01 Descoberts	89	86		
02 Comptes cancel·lats	0	0		
03 Càrrecs elevats (>1.800 Euros)	22	19		
04 Abonam. elevats (>6.000 Euros)	14	10		
81 Tg.preferent: crèdit 25-60 anys	1237	1075		
87 Oferta DBA Plus 50	68	68		
88 Venciments DBA 05-2005	8	7		
89 Gerents NO RESIDENTS	67	67		
90 Venciments DBA Juny-Juliol 2005	6	5		
91 Venciments DBA Agost-Set. 2005	12	11		

Below the table, there is a "Criteris de selecció" section with the following fields:

- Oficina:** 0024 SALT-MAJOR
- Selecció de dates:** 30/ago/2005
- Moneda:** (dropdown menu)
- Saldo:** (dropdown menu)
- Saldo Ant.:** (dropdown menu)

The browser address bar shows the URL: <http://transportal:8000/Alarmes/>. A "Sitos de confianza" icon is visible in the bottom right corner of the browser window.

Applications view into the Portal area

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The screenshot displays a web application interface with a navigation bar at the top containing buttons for 'Inici', 'Àrea comercial', 'Àrea Transaccional', 'Àrea de informació', and 'R.R.H.H.'. A search bar on the right is labeled 'Anoti Codi' and 'This topic'. The main content area is divided into several sections:

- Productes i serveis:** Includes links for 'Obrir nou producte', 'Obrir expedient de risc', and 'Alta nou client'.
- Activitats comercials:** Shows 'Alarmes sacom (10)' and 'Expedients pendents (7)'.
- Informació:** Includes 'Catàleg de productes', 'Tarifes', and 'Simulacions'.
- seguiment:** Includes 'Objectius' and 'Campanyes'.
- Altres Webs:** Includes 'Oficin@ 24 hores'.

The central part of the interface features a 'Codi Client' and 'NIF Client' input field with a 'Consultar' button. Below this, there are two main data views:

Alarmes Sacom (Alarmes diàries i aperiòdiques / Alarmes mensuals)

Descripció	Nº alari	Nombre
01 Descoberts	89	86
02 Comptes cancel·lats	0	0
03 Càrrecs elevats (>1.800 Euros)	22	19
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91 Venciments DBA Agost-Set. 2005	12	11

Campanyes (Bar chart showing 'Número d'accions' vs 'Campanyes'). The chart compares 'Previstes', 'Planificades', 'Endarrerides', 'Positives', and 'Negatives' across campaigns CG0000, CG0003, CG0005, CG0007, and CG0009.

Expedients pendents oficina 212 (Oficina :212 - Data: 24/08/2005)

Expedient	Risc	Data Env.	Import	Nom del primer titular	S	E	T
2005008597	Préstec	03/06/05	1.000,00	NOM 933 COGNOM 474 CO	20	01	10
2004007269	Préstec	04/10/04	1.000,00	NOM 604 COGNOM 391 CO	20	01	10
2004004990	Préstec	15/06/04	1.000,00	SANTIAGO MARTO I GEN	50	10	10
2004003632	Préstec	29/04/04	1.000,00	XAVIER TINTO GONZALEZ	50	12	10
2004001596	Préstec		1.500,00	XAVIER TINTO GONZALEZ	30	10	01
2004000570	Préstec		1.000,00	XAVIER TINTO GONZALEZ	20	01	00
2003902792	Préstec		1.300,00	LLOIS ANGLADA GARRIGA	22	10	01

Integrated view of different applications

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The screenshot displays a web application interface for a client's profile. The interface is organized into several sections:

- Navigation:** Top menu with 'Inici', 'Àrea comercial', 'Àrea Transaccional', 'Àrea de informació', and 'R.R.H.H.'. A search bar contains 'This topic'.
- Client Information:** 'Codi Client:' and 'NIF Client:' fields with a 'Consultar' button. 'Client 1' and 'Client 2' tabs are visible.
- DADES DEL CLIENT (Client Data):** A form with personal details:

DADES PERSONALS			
Nom	Edgar	Adreça	Avd Diagonal 540
Primer Cognom	Gomez	Població	BARCELONA
Segon Cognom	Jaramillo	Codi Postal	08080
DNI	111111C	Província	GIRONA
Nacionalitat	Espanya	País	Espanya
Estat Civil	Solter	Telefón fixe	93456898
Sexe	Home	Telefón Mòbil	658 56 55 55

 Includes a photo of the client and a 'Veure D.N.I.' button.
- PRODUCTES CONTRACTATS (Contracted Products):** A table summarizing contracted products:

Tipus de Producte	N. Compte/Servei	Rel.	Disp.	Saldo	Accions
TERMINI ESP. 3A	3000.000.043369.6	PR	IND	984.541,85EUR	
LL PENSIONISTA	3000.000.051987.1	PR	IND	-6.033,12EUR	
EST.TERM. ANTIC	3000.000.053708.0	PR	IND	20,00EUR	
LUB. 26 MESOS	3000.000.053710.1	PR	IND	6.901,00EUR	
EST.TERM. EXTRA	3000.000.053711.0	PR	IND	-98,00EUR	
EST.TERM. EXTRA	3000.000.053722.2	PR	IND	22,00EUR	
OP.BORSA ASSEG	3000.000.053742.8	PR	IND	0,00EUR	
OP.BORSA ASSEG	3000.000.053746.4	PR	IND	0,00EUR	
PLA JUBILACIO	3000.000.053747.3	PR	IND	0,00EUR	
- INDICADORS (Indicators):** A dashboard with progress bars for 'POTENCIAL', 'RISC', 'PUNTS ACUMULATS' (1325), and 'EVOLUCIÓ'.
- PRODUCTES RECOMANATS (Recommended Products):** A list of six recommended products:
 - Asegurança de vida
 - Targeta personalitzada
 - Plans de pensions renda variable
 - Contractació oficina virtual
 - Domiciliació de nòmina
 - Préstec finançament estudis
- ALERTES (Alerts):** A section with alerts like 'Escanejar D.N.I.' and 'Falta data naixement'.
- Footer:** A URL bar showing 'http://transportal/transactor.net/content/ClientAllInformation.aspx?InputData=TxFld_AcctNbr;;TxFld_ClientID;;TxFld_TaxID;45491' and a 'Sitos de confianza' icon.

Workflow

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Peticion solicitud de vacaciones - Caja Ávila

Año: 2005 Nº Personal: 1000

Destino: Mallorca

Apellidos, Nombre: Luis, Fernandez Garcia

Primer día hábil de vacaciones: 5 noviembre de 2005

Último día hábil de vacaciones: 5 noviembre de 2005

Fecha de la petición: 09/11/2005

Buttons: Imprimir, Guardar, Enviar petición

Form

Subsistemas Pendientes de Aprobación

Numero	Personal	Apellido	Nombre	Destino	Primer día hábil	Ultimo día hábil	Día inicio	Día fin	Fecha de entrega
146	8881	Luis	Fernandez Garcia	Mallorca	06/11/2005	07/11/2005	07	07	05/11/2005

Subsistemas Rechazados

Numero	Personal	Apellido	Nombre	Destino	Primer día hábil	Ultimo día hábil	Día inicio	Día fin	Fecha de entrega
146	8881	Luis	Fernandez Garcia	Mallorca	06/11/2005	07/11/2005	07	07	05/11/2005

Status inquiry

Subsistemas Pendientes de Aprobación Jefe departamento

Numero	Personal	Apellido	Nombre	Destino	Primer día hábil	Ultimo día hábil	Día inicio	Día fin	Fecha de entrega
146	8881	Luis	Fernandez Garcia	Mallorca	06/11/2005	07/11/2005	07	07	05/11/2005

Subsistemas Aprobados por Jefe departamento

Numero	Personal	Apellido	Nombre	Destino	Primer día hábil	Ultimo día hábil	Día inicio	Día fin	Fecha de entrega
146	8881	Luis	Fernandez Garcia	Mallorca	06/11/2005	07/11/2005	07	07	05/11/2005

Approval Workflow

Subsistemas Pendientes de Aprobación Jefe departamento

Numero	Personal	Apellido	Nombre	Destino	Primer día hábil	Ultimo día hábil	Día inicio	Día fin	Fecha de entrega
146	8881	Luis	Fernandez Garcia	Mallorca	06/11/2005	07/11/2005	07	07	05/11/2005

Subsistemas Aprobados por Jefe departamento

Numero	Personal	Apellido	Nombre	Destino	Primer día hábil	Ultimo día hábil	Día inicio	Día fin	Fecha de entrega
146	8881	Luis	Fernandez Garcia	Mallorca	06/11/2005	07/11/2005	07	07	05/11/2005

Cross Selling

UNISYS

The screenshot displays a web application interface for UNISYS. At the top, there are navigation tabs: 'Inici', 'Àrea comercial', 'Àrea Transaccional', 'Àrea de informació', and 'R.R.H.H.'. Below these, a search bar contains 'This topic' and an 'OK' button. The main content area is titled '001 - Carrec' and is divided into several sections:

- Activitat Transaccional:** A sidebar menu with options like 'Eines', 'Diari', 'Operacions', 'Dispensador', and 'Diversos'.
- Form Fields:** A table of input fields for transaction details:

Compte	415967513
Import	123,00
Data Valor	12/12/2005
Codi Operació	4654
Codi entitat	2153
Codi Carta	4652
Concepte Alta	Tf_93
- Altres Opcions:** A section with two identical blocks for 'Titular 1 Fitxa Client' and 'Titular 2 Fitxa Client'. Each block contains a 'Productes recomanats' list:
 - 1.- Asegurança de vida
 - 2.- Targeta personalitzada
 - 3.- Plans de pensions renda variable
 - 4.- Contractació oficina virtual
 - 5.- Domiciliació de nòmina
 - 6.- Préstec finançament estudis
- Buttons:** 'Acceptar' and 'Tornar' buttons are located at the bottom of the form and options sections, respectively.

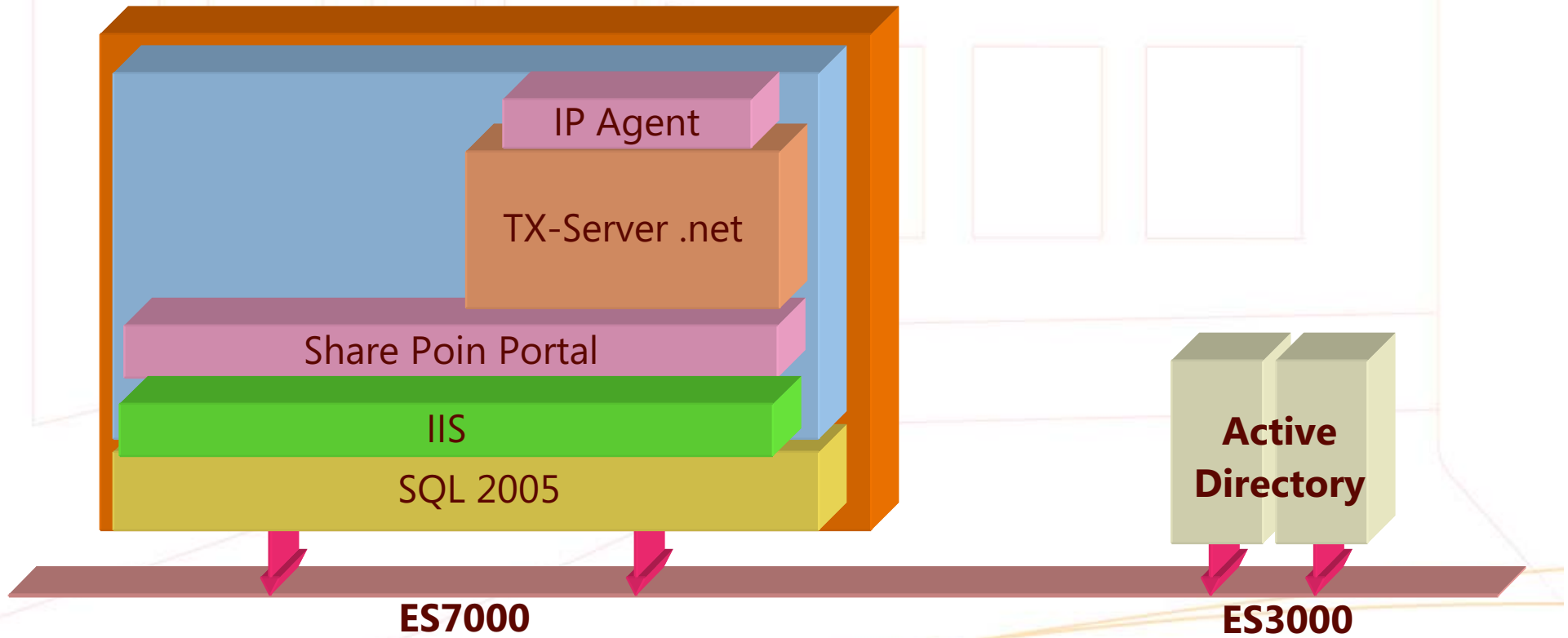
How we do it

UNISYS

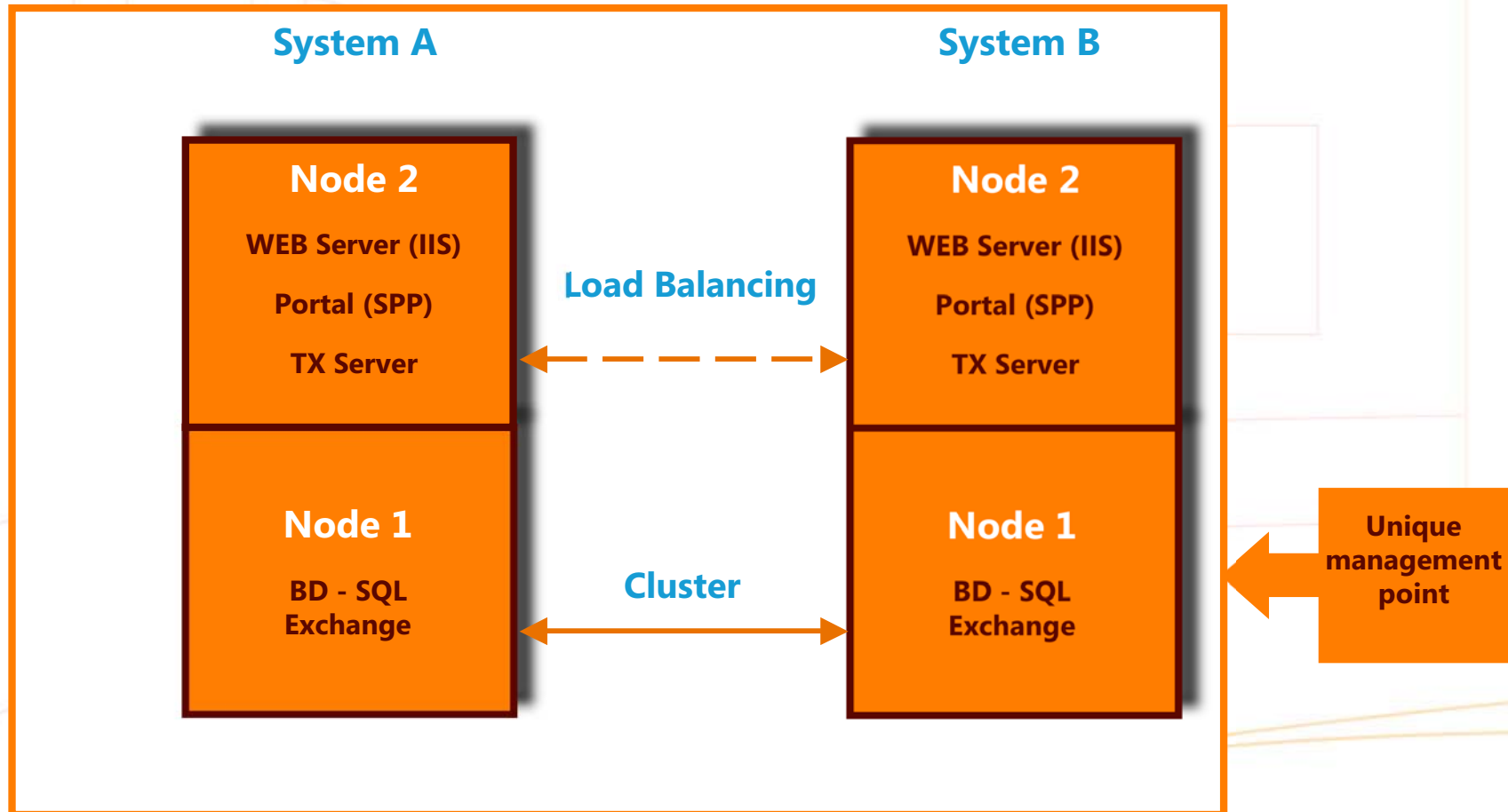
- Implement a Corporate Portal based on Microsoft Share Point Portal
- Implement .net architecture
- UFTM 6.0 (Transactor .net) as a middleware
- Development tool : Visual Studio .net
- Integrate Exchange and Office
- Implement an infrastructure based on ES7000, W2003, SQL Server and Active Directory

Architecture

UNISYS



ES7000 architecture



Knowledge/Creativity

UNISYS

- Knowledge: experience in branch projects
 - More than 20 years on sales and services
- Creativity
 - Business approach → Increase efficiency
 - Portal Concept for branches → Integration, help to sale

Lessons learned

UNISYS

- Business driver, not technical driver
- End to end proposal, not just development
- Prototype is a key factor to help customer to understand the project
- Centralized servers are critical, client wants something similar to mainframes (ES7000 justification)

UNiSYS

imagine it. done.

Sweepstake

Complete your Feedback form
and have a chance
to win a Zune!*



* English US version