



industry data sheet

## Financial Services

### Enterprise Content Management—Competitive Advantage in the Global Marketplace

In the global marketplace, money moves fast—crossing geographic boundaries in an instant. So financial services companies that want to compete in this market need to access, manage, and use information just as quickly. Speed and control are the keys to reducing product cycle time and accelerating response to customers while driving cost and inefficiency out of business processes. Achieving these objectives requires a comprehensive system for leveraging knowledge assets. Point solutions simply create barriers to the rapid exchange of information and increase total cost of ownership for the knowledge value chain.

Along with providing increased opportunity, global markets also increase the pressure on financial services companies to reduce product cycle time, accelerate response to customers, and maximize the efficiency of every business process.

Only enterprise content management (ECM) can deliver a scalable, extensible, standards-based platform that manages traditional documents, Web content, and rich media assets, making them accessible throughout the enterprise and publishable to any channel or device. With ECM the right information can be in the right hands on demand. ECM manages the creation, modification, publishing, and retirement of content. It controls access and security. And it can scale to global dimensions while accommodating local language, culture, and currency.

#### Documentum — The Global Leader In ECM Solutions

Documentum is the leading provider of ECM solutions for financial services organizations. For these companies, efficient use of information is the key to growing revenue and servicing customers effectively. But in financial services, information has a limited shelf life. It must be used quickly to leverage its value—yet securely to avoid

substantial liability. With its native XML functionality, Documentum 4i eBusiness Platform accelerates the use, reuse, and secure exchange of information. It fully leverages the strengths of XML:

- On-the-fly document generation reduces time-to-market for product and service information
- Multi-channel delivery, including wireless devices, .com sites, and portals, enables targeted marketing
- Content intelligence features such as automated tagging and categorization of Web content enhances leading personalization engines
- Support for LDAP, SSL, and digital signatures delivers the appropriate security for each business process

Built with open APIs and a J2EE-compliant architecture, Documentum also speeds application development and eases integration with other technologies. Plus, it is the most scalable solution on the market, serving global

organizations that manage billions of content objects. From authoring, editing, and publishing to distribution, security, and rights management, only Documentum provides the content management platform to handle traditional document management, digital asset management, and Web content management across the enterprise.

#### Documentum—the Choice of Industry Leaders

Many leading financial services companies rely on Documentum 4i eBusiness Platform to reduce cycle time, accelerate the creation of complex financial documents, manage vital customer content across multiple channels, ensure compliance through automated business processes, and boost productivity and efficiency. Documentum manages content across the spectrum of business processes and applications.

- **Web content management for .com sites and corporate portals.** A scalable eContent Repository, automated workflow, and template-based publishing means non-technical users can manage any number of sites, of any size. Brand standards are easily maintained across multiple sites.
- **Pitch books.** While often time consuming to produce, pitch books are essential to selling complex financial services. By providing thumbnail views and management of reusable components, Documentum enables the rapid production of sophisticated presentations that address the unique requirements of each client.
- **Swaps and derivatives.** Rapidly processing swaps and derivatives reduces operational risk and overhead. Confirms can be created, reviewed, changed, and accessed in a controlled, auditable environment.
- **Research.** Native XML support allows research and marketing information to be separated into reusable components. Analysts, sales associates, investment bankers, and marketing professionals can quickly reassemble those components into custom renditions while using familiar authoring tools.

- **Intelligent forms.** Documentum support for Web-based intelligent forms streamlines forms-intensive business processes. Automated workflow ensures that required sign offs and approvals are obtained.
- **Standard Operating Procedures (SOPs).** Making new SOPs instantly available to global offices or remote locations provides your company with the assurance that employees can retrieve and comply with new operating procedures.
- **Imaging and workflow.** Workflow and handling multiple content types are historic strengths of the Documentum platform. Many processes that remain paper based can be accelerated and managed more efficiently using Documentum.
- **Direct e-mail campaigns.** With Documentum, templates, workflow, and rules-based publishing enable the automation of direct e-mail campaigns and other syndicated marketing efforts while promoting brand consistency.

#### The Smart Money Is Turning to Documentum

More than 100 financial services companies rely on Documentum to limit operational risk and reduce cycle time, enhance customer service, protect brand equity, and leverage knowledge assets to generate new revenue streams.

To learn more about Documentum solutions for financial services, please call 800.607.9546 (outside the U.S.: +1.925.600.6754) or visit us online at [www.documentum.com](http://www.documentum.com)

#### A Partial List of Documentum Customers in Financial Services

Bank of Tokyo-Mitsubishi	Nomura Securities International
Banco de Espana	Pictet & CIE
Barclays Global Investors	Putnam Investments
Cazenove	Scudder Kemper Investments
Dreyfus Services Corporation	Salomon Smith Barney
JPMorganChase	T. Rowe Price
MasterCard International	UBS Warburg
Merrill Lynch Japan	Visa U.S.A.
myCFO	Zürich Capital Markets
Nabab (Societe Generale)	



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These organizations recognize that only Documentum combines the strength of traditional document management with a scalable, enterprise-wide content infrastructure, simplified Web publishing, and XML content authoring for non-technical users.