The financial services industry has witnessed a sea change from the conventional brick-and-mortar set up, to having multiple business channels including ATMs, call centers, smartphones and PDAs, and portals. Exponential growth of the Internet and increased customer expectations have made it critical for banks to provide more than just the basic information online. Banks portals are now a means of offering value-added services to existing customers while acquiring and maintaining new relationships. NIIT Technologies’ deep domain knowledge helps clients in building an effective portal that not only meets productivity demands, but can also amplify the organization’s range of accessible customers.
Setting the Pace with Virtual Banking

The widespread adoption of digital banking by the informed and connected customer means that customer engagement must go beyond the traditional mode of phone and personal interaction. With NIIT Technologies' Advisor Portal Solutions, organizations can work in collaboration with other employees and respond faster to customer requirements. Our best-in-class portal development and implementation solutions for global clients deliver critical tangible benefits:

- Deep domain expertise
- Software engineering
- Solution design excellence
- Proven capabilities of industry leading products
- Addressing of unique and challenging compliance needs of global organizations

Our Solution

NIIT Technologies’ integrated portal services—Advisor Portal Solution—is based on the fundamentals of providing a personalized user environment, enhancing customer satisfaction and retention through self-service, increasing sales, ensuring access to real-time data, and reducing time-to-market for new financial products. We are able to help clients achieve this through:

- Best-in-class advisor portal design
- Development and implementation for financial institutions
- Domain consultants offering personalized applications
- Accessing, sharing and aggregating, and managing data through a single portal platform
- Facilitating 'standardization' of data across borders
- Optimizing cost of information lifecycle management
Getting it Right

The key features of the solution include:

- Interface with third-party transaction, content management systems, and news feed providers for:
  - Capturing order details
  - Connecting with third-party compliance engines for KYC and AML capability
  - Interface with external CRM systems for client servicing
  - In-built forum capability and news feeds from various providers
- Financial calculators and fund analysis for:
  - Getting research capabilities
- Selecting appropriate fund based on the risk profile of customers
- Computing returns of end customer portfolio
- Comparing portfolio performance
- Risk profiling
- Portfolio management capability of generating customized reports
- Tracking commissions from various sources
- Effective management of incoming revenues and outgoing expenses
- Sending mass short messages to clients
- Customized widgets
The NIIT Technologies Advantage

The proliferation of the Internet has set in pace virtual banking, arguably one of the most important innovations in banks and financial institutions, so the need for a robust and effective portal is being felt like never before. With our Advisor Portal Solutions Framework, you can look forward to a responsive Web design that ensures a seamless user experience regardless of access medium: Smartphones, tablets, laptops, or desktops.

NIIT Technologies ensures quick development and deployment of portal solutions. This enables financial institutions to quickly engage with their audience and increase profitability and productivity by letting customers conduct business anywhere, anytime.

Delighted Customer Experience

- ETL features for effective data management
- Web services integration with third-party financial institutions
- Robust presentation with charts, graphs, user controls, themes, and CSS
- Business features comprising authentication, authorization, validation, messaging, alerts, content management, document management, search, archival, forms pre-filing and document generation
- Secured and SSO-enabled
- Customized logging and tracking
- Mobile-enabled

For more information, contact marketing@niit-tech.com

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NIIT Technologies is a leading global IT solutions organization, differentiated on the strength of domain expertise; it services clients in travel and transportation, banking and financial services, insurance, manufacturing, and media verticals. Leading with its service vision “New Ideas, More Value,” NIIT Technologies is committed to delivering new ideas combined with operational excellence to provide exceptional value to its clients. The Company is focused on helping businesses design sustainable, optimize and winning digital operating models, enabling them to become agile, scalable and flexible. Visit us at www.niit-tech.com