



Unify & Simplify
all your daily communications

WEEKLY MESSAGELINK

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VALUE OF UC TO THE FINANCIAL INDUSTRY



FINANCE GETS THE MESSAGE

Instant messaging and text messaging have emerged as an essential application in the financial services industry, where brokers and underwriters have come to rely on the technology to stay in touch with customers and each other in an industry where information moves markets and timing is everything.

Financial services is the industry that has the most leading-edge usage of IM, followed by insurance, technology services and business

consulting. Small companies as well as large are attracted to the technology. The instant part of instant messaging is a very good draw for this industry. Everybody is working at light speed. Customers would much rather do IM than send an email. Smart devices such as BlackBerries are not fast enough for customers who want "instant communications." Seeking to promote the adoption of standards and interoperability, several IT Pros at financial services companies have banded together in a user group called the Financial Services Instant Messaging Association, or FIMA.

With the advent of public IM usage with no control or audits, security is a big issue for this reason IT managers are seeking to exert greater control over IM deployments at their companies so that communications are reliable, secure and archived for compliance with Securities and Exchange Commission Guidelines as well as laws such as the Sarbanes-Oxley Act. Controlled text-message for employees with key customers delivers secure traceable instant communications, which gives clients access to the company's sales force analysis, anytime of the day. Controlled and audited IM such as the LANTALK platform delivers the goods for the financial industry! It brings together real-time text-messaging for both online and offline access, combined with a controlled audited platform that delivers necessary security an organization needs to fully deploy instant text-messaging throughout the

organization.

LANTALK integrates both IP and SMS wireless networks to deliver anywhere, anytime access to instant text-messaging. Users can search status and availability through their corporate directory and send text to any profile other users have made available. Because this is an enterprise platform only trusted users can join the directory and network to communicate. Financial organizations can send out the latest research on equities by its analysis via IM blasts. It becomes a selling tool to encourage trading.

One-to-one meetings are also important. If a customer wants to talk to a salesman, they can use the chat function to contact them instantly and know in real-time their availability and push the IM to a live Meet Me conference for group discussions. Financial organizations depend heavily on the archiving features of the implementation for compliance purposes.

With UC custom archiving scripts can be built to grab text dialog from the system logs. This delivers the organization full compliance and an audit trail for the conversations conducted within the organization.

IM can be made to allow brokers to communicate with customers. VIP customers are provided guest accounts on the unified communication platform and setup as IM only users. Their clients are on IM, and it provides a secure way of communicating and providing compliance. Communications are primarily concerned with indications of interest in stocks, orders and order follow-up.

Very sophisticated clients want to deal directly with investment products and chat with the trading desk. LANTALK when deployed makes IM a popular tool among wealth management clients as they have access to the app from any desktop OS or mobile device! Imagine a customer chatting online to a person in Tokyo about Japanese equities!

All these uses translate to continued proliferation of live communications within the financial services industry

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