

# How financial services organizations can achieve security, flexibility, and greater efficiencies with virtualization

Keep pace with changing business demands while enabling secure, seamless access to corporate resources

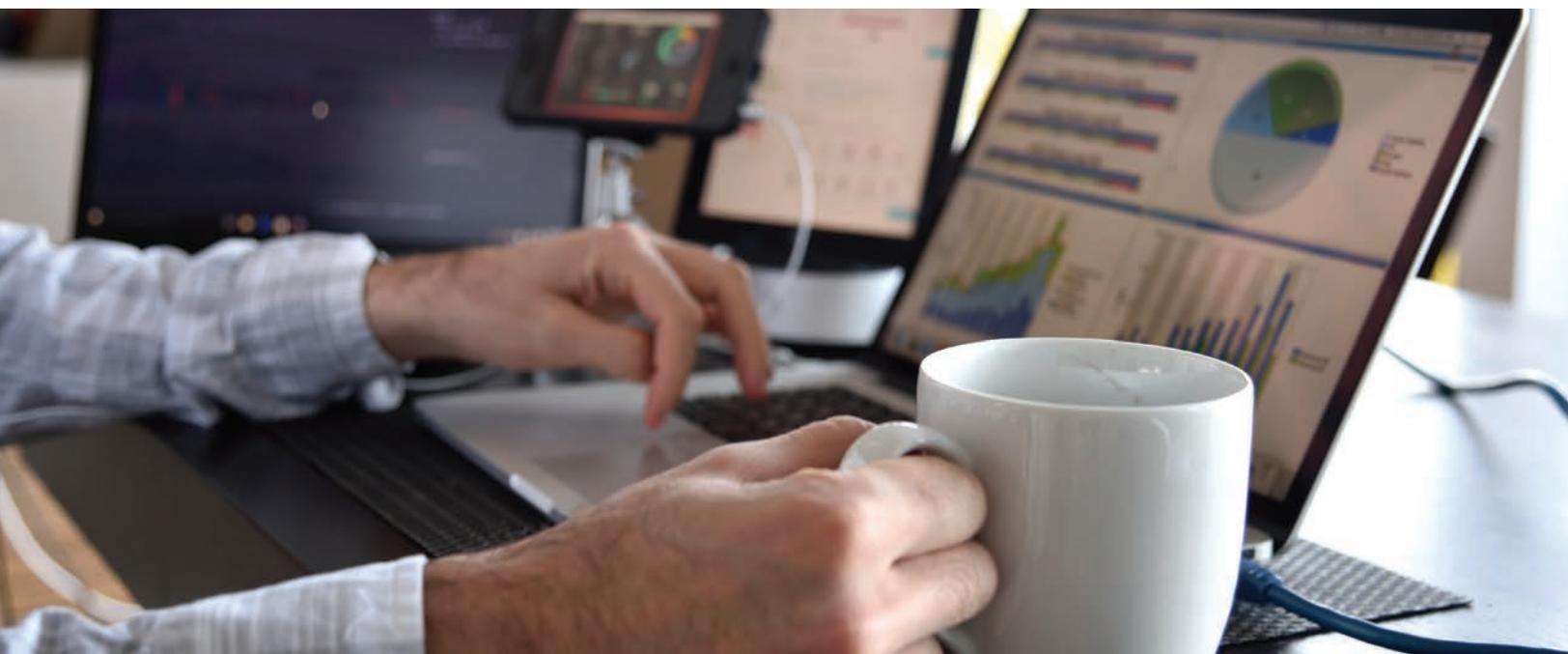


Today's banking and financial services industry (BFSI) is competitive and dynamic. Organizations must rapidly adapt and meet changing demands—from scaling headcounts during seasonal peaks to giving employees the flexibility to work from any device and location.

In this fast-paced market, agility matters. The ability to quickly open a location or integrate an acquisition can make all the difference in seizing opportunities and staying ahead of the competition. IT teams must empower business growth by supporting new customer service models and providing a great user experience for their customers, employees, and development community. However, they must do this while reducing the risks of data breaches, compliance violations, and business interruptions.

With large data breaches making the news almost daily, security and compliance are more critical than ever before. But in an effort to secure data, IT teams are often forced to implement restrictive or cumbersome policies that harm the user experience. Making employees take too many steps can harm productivity and cause them to use services that are outside of IT's control. Ironically, this shadow IT creates unnecessary compliance and security risks. To achieve the best business and security results, IT teams must address these challenges while reducing the cost and complexity of delivering corporate resources.

Citrix solutions help financial services organizations quickly and securely meet new business demands—while improving the employee and customer experience. Through a flexible architecture, IT teams can deliver apps, desktops, and data wherever employees work, on any device they use, and with the controls needed to meet increasing compliance and security demands.



**Virtual Apps and Desktops allows IT teams to provide secure, unified access from any device—anywhere—to custom, legacy, Windows, Linux, web, and SaaS apps.**

## **With Citrix solutions, your organization can:**

- Secure data, stay compliant, and reduce risks through policy-based access control, data centralization, and full auditability
- Reduce IT maintenance and storage costs and complexity with a centrally managed infrastructure that simplifies patches, upgrades, migrations, and app rollouts—while making it possible to close security gaps quickly
- Increase agility, while reducing capital expenditures, by using a hybrid or multi- cloud infrastructure
- Support flexible work styles by giving employees on-demand, secure access to all of your apps and data—from any device and location
- Ensure workforce continuity and better meet service level agreements by quickly scaling your resources to support new locations, pop-up branches, offshore staff, roaming agents, and non-traditional sites across the globe

## **IT teams in financial services organizations are under increased pressure**

Mergers, acquisitions (M&A), offshoring, natural disasters, and the hiring of seasonal workers create daunting challenges for IT teams. Sudden rises in headcount increase the resources you need to provision workspaces and support all the employee devices that access your corporate resources. If IT can't scale quickly enough, business slows, which can negatively impact your end-user experience and bottom line.

Speed is something that your financial services organization depends on, as you operate in an ultra-competitive market where every idle worker represents a lost opportunity, and every minute of downtime can cost millions in revenue. Maintaining business continuity is essential. However, deploying and maintaining redundant data centers, apps, and systems can create a sprawling IT footprint that increases your security risks, operational complexity, and costs.

The highly distributed nature of BFSI forces IT teams to look beyond traditional approaches to infrastructure. Users—including employees, contractors, and customers—are dispersed across branch offices, customer sites, and a variety of non-traditional and temporary locations. Users need the flexibility to bring their own device, travel, and work from kiosks or coffee shops. Meanwhile, IT teams need a simple, secure, flexible, and cost-effective way to deliver resources to employees wherever they are working and on whatever device they choose. This flexibility is also critical if you want to hire top talent without being constrained by geography. The ability to empower workers with on-demand, anywhere access can help you field the best workforce—but only if IT can provide an excellent workspace experience that starts with unified access to all apps and data.

**Applications that run on Virtual Apps and Desktops, as well as run in the datacenter rather than on a device, cut transaction times of client/server applications by as much as 300 percent.**

## Gain consistent, secure access to apps and data

Citrix® solutions transform financial organizations to meet a new generation of requirements. With Citrix Virtual Apps and Desktops™, IT teams can respond to business needs quickly by centralizing the management and delivery of apps and desktops. By keeping these resources secured in the data center, they can more effectively protect sensitive information, enhance corporate security, respond to compliance mandates, and shield against cyber threats—while meeting worker and customer demands to access their apps and data from any location on any device.

Virtual Apps and Desktops allows IT teams to provide secure, unified access from any device—anywhere—to custom, legacy, Windows, Linux, web, and SaaS apps. Users across the financial services spectrum get seamless access to the tools they need to get the job done, such as loan and insurance applications, banking and trading platforms, custom apps, CRMs, and more. The solution is optimized for today's workforce where employees work on more than one device. It automatically detects the type of device being used and provides a touch-enabled, mobile workspace experience for all of its desktops and applications.

## Enhance security, compliance, and business continuity

By keeping data secure in the datacenter, not on endpoints, your IT team can protect valuable data and intellectual property while complying with regulatory mandates. Virtual Apps and Desktops is FIPS-compliant and Common Criteria- certified to meet the highest security standards of regulated industries. IT teams can reduce the risk of data loss and prevent unwanted intrusions through granular application- and data-level access control, specifying access based on user identity, location, and device. They can also apply upgrades and patches through a single central image, closing security gaps quickly. In the event of a disruption, the same infrastructure that supports your organization during routine operations will ensure business continuity, as workers can securely access their apps, desktops, and data from any location using any available device.

## Boost IT efficiencies while controlling costs

IT teams can manage apps, desktops, and operating systems from a central location through a single management console and no longer need to update machines individually. They also won't need to send IT personnel or devices back and forth for troubleshooting. This time savings allows them to onboard new users, lines of business, and facilities more rapidly. IT teams can also migrate to new apps and operating systems faster, further increasing flexibility and security while reducing costs.

A more efficient architecture also gives users better performance. For example, applications that run on Virtual Apps and Desktops, as well as run in the datacenter rather than on a device, cut transaction times of client/server applications by as much as 300 percent.

## Increase business agility and flexibility

Virtualization allows your employees to use any device to access apps, desktops, and data without the need for IT to image or physically deliver new equipment. IT teams can deliver everything from a full desktop to a single application, depending on an employee's role and specific needs. This agility helps IT to quickly adapt to changes in the workforce resulting from M&A, divestitures, seasonal peaks, and other circumstances. Meanwhile, your employees will have greater flexibility in how they serve customers. For example, branch employees can securely roam from desktops to laptops to mobile devices to help customers who are standing in line.

## Improve employee productivity and customer service

Citrix solutions maximize productivity and job satisfaction by enabling brokers, tellers, advisors, call center staff, and other employees to securely work anywhere using any endpoint. A self-service app store gives users convenient access to all the corporate apps and desktops they need, through a single unified application, the Citrix Workspace™ app. These services run on all major operating platforms, including iOS, Android, Windows, Mac, and Linux.

Citrix technology also delivers a high-definition user experience and ensures superior performance, even over challenging, high-latency networks. Using Virtual Apps and Desktops, bottlenecks are removed from employee workflows so that they can quickly respond to customer needs and deliver better service.



## Willis Towers Watson



**The new cloud-enabled service will be aligned to individual roles and workstyles and will ultimately provide the technological agility to allow [us] to adapt and ‘Flex’ to future business demand,”**

– Andy Champion  
Head of Workplace Technology  
Engineering, Willis Towers Watson

## PARK BANK



**The Citrix environment has helped us build our reputation as a trusted partner to both consumers and real estate professionals.”**

– Trent Sveom  
Vice President of Mortgage Lending,  
Park Bank

## Financial services success with Citrix solutions

### Willis Towers Watson

Willis Towers Watson is a leading global advisory, broking and solutions company that helps clients around the world turn risk into a path for growth. With roots dating to 1828, Willis Towers Watson has 40,000 employees serving more than 140 countries.

#### The need

As part of their End User Computing transformation program, Willis Towers Watson wanted to deliver centralized application and desktop virtualization services through a solution referred to internally as “Flexible Provisioning.”

#### Results achieved with Citrix

“Although Willis Towers Watson have leveraged Citrix technology for many years,” said Andy Champion, Head of Workplace Technology Engineering at Willis Towers Watson, “the new ‘Flexible Provisioning (Flex)’ service will help drive significant operational efficiencies for the growing organization through enhanced information security, reduced business risk, and improved business continuity—while improving both employee and business productivity.”

“The new cloud-enabled service will be aligned to individual roles and workstyles and will ultimately provide the technological agility to allow Willis Towers Watson to adapt and ‘Flex’ to future business demand,” added Champion.

### Park Bank

Park Bank, located in Dane County, Wisconsin, is one of the area’s top mortgage providers. The institution opened its first branch in 1966 and has since expanded to 11 branches across the Madison metropolitan area.

#### The need

The way Park Bank goes to market has changed dramatically in the past 10 years. In the past, customers would come to a branch. Now, the bank must go to the customer. Technology has changed everything.

In this fast-moving market, Park Bank staff need consistent, anywhere access to the latest lending data and customer records so that they can serve customers from any device and location.

“Technology has had a dramatic impact on the banking industry,” said Jeff Kurek, IT Systems Officer, Park Bank. “It’s important we provide our workforce with the tools, the applications, and the products that they need to keep up with that rapid pace.”

## Results achieved with Citrix

With Citrix solutions, Park Bank's mobile workforce is more dynamic and more effective. They now have anywhere, anytime access to the bank's digital systems and can easily meet with customers outside the branch environment. This flexibility has made all of the bank's processes faster—from completed loan applications to credit checks to lending decisions.

Meanwhile, centralized controls allow the bank to easily deploy business-critical applications to any device. The bank is also more secure, as it can retain sensitive customer information in its own data center. This means sensitive information is viewable, but never stored, on mobile devices. "We can launch and control a new desktop from the data center. We have central control over all apps, all devices, and all the data," says Kurek.

Trent Sveom, Vice President of Mortgage Lending at Park Bank, says the effectiveness of the Citrix solution and the consistency of the user experience strengthens the bank's position in the market: "The Citrix environment has helped us build our reputation as a trusted partner to both consumers and real estate professionals. If customers enjoy working with us, they share that experience."

## Conclusion

IT teams in financial services organizations are under pressure to apply greater security controls without compromising business agility or employee productivity. To do this, they must move beyond traditional desktop management to centralized, virtual app and desktop delivery.

Citrix solutions such as Virtual Apps and Desktops enable your IT team to efficiently deliver essential apps, desktops, and data to employees and contract workers on any device, anywhere. Your employees will gain a more flexible work experience that will boost their productivity and job satisfaction. Meanwhile, the centralization of business-critical data simplifies your operations while improving your IT security and regulatory compliance.

Ultimately, this corporate-level agility can help you keep pace with market demands and capture new business opportunities.

## Additional resources

- [Citrix solutions for financial services](#)
- [Citrix Virtual Apps and Desktops](#)



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