Remote access for financial services success

Simple, secure ways to deliver a productive user experience
As mobile workstyles transform the way financial services institutions work, remote access has become more important than ever.

In enabling financial advisors, agents, brokers and other employees to work anywhere, on any device, financial services organizations need to meet IT requirements for security, compliance and manageability – but it's just as important to consider the employee experience.

A financial services institution's remote access strategy usually focuses on IT priorities such as protecting sensitive data, reducing risk and ensuring compliance. While these are important factors, the ultimate customers for a remote access solution are employees who depend on seamless access to apps and data via their thin client or mobile devices while they are at a branch or client site. What matters most to them is gaining the freedom to work on the devices they choose, in the locations where they can be most effective and productive, without having to worry about security details, differences in device form factors or multiple access methods for various networks.

Citrix, a leader in mobile workstyles, has long recognized that remote access has to address the needs of users as well as IT. With an entire team dedicated to user experience, Citrix has developed secure-by-design remote access solutions that make it simple for financial services employees to work the way they choose, anywhere and on any device, to deliver optimal productivity and business impact for their organizations.

Remote access user challenges and solutions
Financial services employees often encounter changes in their remote access user experience as they move across locations and devices. Instead of having a single, consistent way to work, as they did in the wired desktop days, they might need to learn one way to access resources within the office and another at a branch or client location, and learn different interfaces for their laptops, tablets, smartphones and thin devices. Internal company URLs might differ depending on whether the employee is in or out of the office. Remote users often have to authenticate through a secure sockets layer virtual private network (SSL VPN), and might need to use different sets of credentials based on their current location and device.

Once employees are connected, they can encounter significant differences in the way they work as well. Someone working on a
laptop in the office typically enjoys full access to their applications, while a mobile user may find many apps unavailable. Often the ways employees interact with apps can vary by device as well. Most remote access solutions focus on making apps accessible on remote devices, but don’t address the usability implications of various device form factors. A solution or application that assumes the availability of a mouse, especially one with a right-click button, will be difficult or impossible to use on a tablet or mobile device that offers only touch controls.

Data poses another challenge. Inside the office, data can be easily stored and shared in a corporate file share, but these internal network locations are often inaccessible from outside the firewall, or require employees to learn new access methods. For those on mobile devices, the absence of the classic folder paradigm can make accessing and sharing files highly confusing, tempting users to fall back on unmanaged consumer file sharing services beyond the security and control of IT.

Employees may also create additional problems through their own activities. Although many workers are becoming more savvy about technology, this rarely extends to organizational security. Assuming that security is IT’s job, many employees think the tools they use are secure by design – including their remote access solution – and may download and run the latest apps on their smartphone or tablet while having an open connection to company resources. Educating employees about the risks inherent in various remote access scenarios, and what they should do to minimize them, is an uphill battle with little chance of success. In effect, the assumption by employees that their remote access is secure by design means that IT has to ensure that the solution is indeed secure by design.

To give your financial services workforce a remote access experience they’ll love, while meeting IT requirements for security, compliance and manageability, your remote access solution strategy should encompass:

- A single point of self-service access for all the apps and data users require, with a high-quality, consistent experience across devices and locations
- The ability to access IT services over any type of network connection without degradation in performance or adding complexity for users or IT
- A simple, consistent remote access method regardless of whether users connect on an internal or external network
- Integration of productivity apps, including email, calendar and file sharing, to ensure convenient and secure data access, sync and sharing on any device in any location
- Complete functionality for Windows applications and desktops on touchscreen devices

**Delivering the best experience for your remote financial services workforce**

Most financial services technology providers develop solutions tailored strictly to the priorities of their buyers in IT. While Citrix is no less focused on addressing requirements for security, control, manageability, efficiency and other IT considerations, we place equal emphasis on user experience. Financial services employees are most productive, motivated and satisfied when empowered with a simple, high-quality experience whether they’re processing a claim on a thin client at a remote location, fulfilling an order on their laptop at a branch, or conducting other types of work at another location. This helps them drive greater value for the organization, as well as leverage the full value of the IT investments made on their behalf. Simply put, by making the employee user experience a priority in our product design, behavior and performance, we help your
employees work better and deliver better results for your organization.

By applying this user-centric focus in every aspect of the end-to-end experience, Citrix delivers a remote access solution that financial services employees will love. Key aspects include:

- **A single point of self-service access to apps and data via Citrix StoreFront.** This provides employees with a consistent, high-definition experience on any device, across any network, while IT gains a comprehensive single point of aggregation and control for all apps, data and users.

- **A secure-by-design architecture for desktop and application virtualization.** With Citrix XenApp, apps and sensitive customer data stay secure within the data center, and only mouse clicks and keystrokes traverse the network. This eliminates the need to create a tunnel from the secure corporate network to employee devices on unsecure networks.

- **Employee independence in device, form factor and operating system with Citrix Receiver.** The easy-to-install, easy-to-use Citrix Receiver universal client delivers a high-definition employee user experience by dynamically adjusting settings based on the employee's activity. This is enabled through Citrix HDX technologies including HDX MediaStream, which leverages endpoint processing power to render multimedia content; HDX VoIP optimization, which processes voice streams locally using advanced voice routing and HDX RichGraphics and 3D Pro, which optimize the performance of media-rich and graphics-intensive 2D and 3D applications.

- **A consistent remote access method over any network.** Unlike a VPN solution, remote access works the same way whether the employee is on an internal or external network. In many cases, Citrix financial services customers choose to treat every employee – local or remote – as a remote user, allowing them to use the same Citrix access point and credentials regardless of where they are working.

- **Easy data access, sharing and storage on any device, in any location.** Citrix ShareFile provides a centralized repository for all of an employee's data, which remains protected within the data center. Remote employees can access data, including client statements, financial reports, contracts and more from any app or desktop, and share it securely with colleagues, third-party vendors, customers and/or clients inside or outside the company – the same way they would inside their organization's network. To satisfy record-keeping regulations and compliance requirements, ShareFile archives account files, folders, sent messages, active and inactive links and notifications for a minimum of three years.

- **A touch-friendly experience for Windows apps and desktops.** The Citrix Mobility Pack automatically re-skins Windows apps for thin clients, tablets, smartphones and other mobile devices. By tailoring the user interface and user input method according to the specific device being used, the Mobility Pack ensures an unimpaired, high-definition experience for on-the-go employees.

- **Integrated productivity apps improve the user experience and productivity.** Citrix Worx productivity apps are integrated for a smooth user experience, so that there is no need to jump out of one app to access the other. For example, the email app can access Citrix ShareFile directly within an email to attach a file. The calendar invite includes a one-touch dial-in for a conference call. With this integrated user experience, security of the files and data can be preserved to comply with mandates.
• Secure access controls for data and apps. Citrix NetScaler Gateway with SmartAccess uses adaptive policy controls to dynamically adjust access levels based on identity, network and device to ensure employees remain secure in every location. It provides adaptive policy controls to configure the most secure access to resources by dynamically adjusting access levels based on device configuration, location and identity. Administrators have complete flexibility to define various access scenarios and corresponding rules based on their organization’s security policies, while employees are free to work from any device.

• Optimized cloud network/wide area network (WAN) and secure app delivery. Citrix NetScaler SD-WAN (formerly CloudBridge Virtual WAN) accelerates application delivery across public and private cloud networks, and provides organizations the unique ability to support WAN virtualization. Combined with visibility into application performance, NetScaler SD-WAN allows organizations to optimize and secure branch office networks.

Conclusion: Remote access is quickly becoming a regular part of work for financial services employees.

By making their user experience a top priority, Citrix delivers a solution that goes beyond enabling remote access to giving employees what they really need and want: simplicity, consistency and a high-definition experience no matter how or where they work. IT can fully address its requirements for security, compliance and manageability while delivering a solution that financial services employees love, and would feel lost without. For the financial services organization, a more mobile and flexible workforce increases productivity, customer satisfaction and reputation.

Additional Resources
Citrix XenDesktop
Citrix XenApp
Citrix NetScaler
Citrix ShareFile
Citrix HDX technology