Financial Services institutions with a significant retail investment are struggling to modernize their retail footprint. The legacy “bank branch” projected security, trust and at times intimidation, however today FSIs are striving for a more open inviting environment that has taken retail and workplaces by storm. In order to create a rich, mobile in branch experience that works well in new open space floor plans, these institutions have to struggle with everything from furniture to technology. The FSI retail experience of the future should be focused on delivering what the branch does best, sell high profit products and deepen relationships with customers. Building new collaborative way of selling can break down barriers in the sales process to engage customers directly into solution creation, product mix and “what if” scenarios that can start in the branch and continue in to a blurred channel strategy.

**Branch Transformation Strategy**

How to tackle this daunting task by breaking down the challenges into three buckets, branch layout, principle technologies and surrounding capabilities.

**Business Benefits**

Gain insight into how other institutions from both financial services and retail have successfully approached transformation. Explore best practices and potential obstacles to avoid common mistakes.

**Get Started**

Take away a simple guided approach to get started, with takeaway demos and best practices.

**Microsoft Technology Centers (MTCs)**

The MTC offers a unique combination of immersive experiences and side-by-side collaboration with world-class architects to provide the optimal environment to learn about and apply new technologies. Your briefing will include mutual discovery, tailored solution drill-downs, and expert presentations culminating with the delivery of a clear and actionable vision of how the Microsoft platform can help you reach your business goals.

Visit www.microsoft.com/mtc to learn more!
Strategy Briefing

Each briefing is tailored to your specific business drivers and requirements and facilitated by an MTC architect. This is a sample agenda.

9:00 am  Introductions and Discovery
Through introductions and discussion of your business challenges, we will explore initiatives and issues that impact the way you conduct business and that will help us provide a contextual presentation throughout the day.

10:00 am  Transformational Strategy
An overview and discussion about the high level best practice approach to transform the retail experience. Floor plan and brand reflection, principle technology (teller, platform sales, etc.) and surrounding capabilities like collaboration, BI and communications.

Noon  Lunch

1:00 pm  Scenario and Example Experience
A demonstration of what is possible with a next generation experience for both customers and employees that can blur the lines between the branch/ATM, online/mobile and call center channels.

2:00 pm  Principle Technology Strategy
How to work with existing or selected ISV partners for teller, platform sales and LOB sales solutions. Best practices on upgrading, customization and selection for the institutions need.

3:00 pm  Surrounding Capabilities
What capabilities are needed to surround the Principle technology to have a seamless experience for employee and customers? Capabilities like collaboration, communication and business intelligence can provide solutions to business requirements for Remote Advisors, Universal Bankers, Referral Incentive programs and day to day operations.

4:00 pm  Wrap-Up and Next Steps
You’ll have a clear and actionable plan to help guide your organization through the process of transforming the retail experience.

To take advantage of the Microsoft Technology Center near you, please contact your Microsoft account team for details.

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