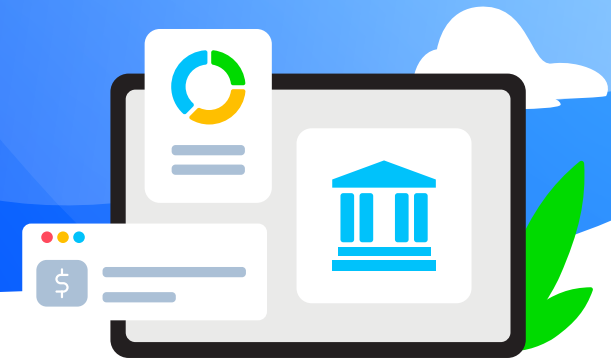**Liferay®**

Key Challenges for the Financial Services Industry

Industry Key Issues and How Liferay Addresses Them

1 Outdated systems and data silos limit the omnichannel experience ▸ Integrate legacy tech and tools to orchestrate a unified digital experience

2 Data security and regulatory compliance ▸ Get enterprise-level security and ISO, CSA, and SOC2 compliance

3 Inefficient manual processes reduce operational efficiency ▸ Automate processes like billing, account management, and transaction processing

4 Demand for exceptional CX raises the stakes for revenue and retention ▸ Personalize self-service for more convenience while lowering costs

5 Complex, time-consuming, and inconvenient onboarding ▸ Streamline onboarding actions, including the submission of KYC-related documents

Solutions Tailored for Financial Services

Client Self-Service Portals

Equip clients with self-service tools for secure financial control via a client portal. Create personalized experiences across channels, automate processes, and maximize your existing technology investments.

Advisor Portals

Boost the productivity of advisors, brokers, and partners with tailored workflows for operational efficiency. Use client data to deliver personalized quotes and identify cross-sell/upsell opportunities.

Employee Portals

Increase productivity and foster collaboration with an intranet that unifies systems, tools, and data on a single platform, enabling easy knowledge sharing and real-time communication.

Wealth Management Solutions

Gain a competitive edge with client-centered websites and portals. Grow AUM with automated, personalized, and data-driven investment advice for efficient portfolio management.

Liferay Credentials in Financial Services
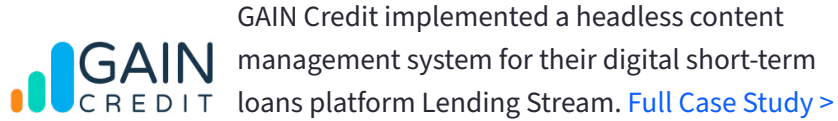
GAIN Credit implemented a headless content management system for their digital short-term loans platform Lending Stream. Full Case Study >

parcIT GmbH designed their new customer portal with Liferay to provide the best possible support for direct customers. Full Case Study >

The Challenges:

- **Long turnaround for content changes**. Updates required coding experience, hindering the marketing team's agility.

- **Lack of a transparent content publication process**. The old platform had limited content tracking capabilities.

- **Low ranking on Google's search results**. Poor SEO and low Lighthouse scores hampered the platform's reach.

The Results:

- **80% improvement in productivity**. Using Liferay's workflow cut publishing time from a week to a day, with in-house edits taking minutes.

- **31-point increase on the Lighthouse score report**. Webpage performance scores soared from 65 to as high as 100 on Lighthouse.

- **Higher page ranking on Google search results.** Liferay's customization and integration capabilities significantly improved Lending Stream's search ranking.

The Challenges:

- **Existing offers and features** had to be carried over.

- **Customers wanted an expanded digital product range** and access to parcIT's online applications.

- parcIT hoped to **improve service quality** significantly.

- The customer portal would need more personalization to **encourage greater transparency and increase sales**.

- Support and IT teams required more **time to focus on strategic projects**.

The Results:

- **A quick launch** in just five months thanks to Liferay PaaS.

- An **improved customer experience** with more self-service and less manual work.

- **Automated interactions and a new range of digital services** to optimize support processes.

- **Increased revenue and adoption** with better customer experience.

- **A modern look and feel**, improved user-friendliness, and intuitive user prompting.

1200+ companies around the world use Liferay: USbank   Desjardins   Carrefour *soluções financeiras*   Santander   SOCIETE GENERALE