

WE GET FINANCIAL SERVICES.

To embrace modern technology,
you need IT Orchestration by CDW®.



Embrace the New Financial Services Landscape

For financial services CIOs and leaders tasked with managing customer service, monitoring employee use and mitigating risk remotely and in-branch, the recent transformation of how work is done has required them to embrace future-forward visions while also overcoming legacy infrastructure challenges that can impede adoption of cloud, automation and other innovative technologies.

CDW Financial Services can help your financial services organization bypass roadblocks to upgrade your security framework, break down data silos, embrace artificial intelligence, improve the customer experience, or assess IT compatibility during a merger or acquisition – whatever your IT needs may be.



CDW for Banks

Customer expectations for secure, personalized, anywhere banking have made transforming core business processes and embracing a faster pace of innovation more critical than ever. Addressing this data challenge through the use of AI and machine learning tools will help banks uncover valuable customer insights and drive more personalized experiences. Upgrading security frameworks can lock down advanced security threats and help banks meet data privacy regulations, like GDPR. And positive market factors like tax reform, interest rates and pro-business regulations will continue to drive continued bank M&A activity. CDW Financial Services can help you ease the technology load with our in-depth industry knowledge and comprehensive IT solutions.



CDW for Credit Unions

A seamless digital experience is the expectation of every single member. But today, that's not enough. Members expect a more personalized digital experience that only advanced data analytics can provide, which makes updating and transforming legacy systems and IT infrastructure a critical step in the digital transformation journey. Likewise, federal regulatory bodies, like the National Credit Union Administration, are stepping up the pressure on credit unions to lock down security frameworks. CDW Financial Services can help you find the right solutions to compete in the digital economy, build member loyalty and clear critical regulatory and security hurdles.

CDW for Capital Markets

Improving the client experience in every aspect of the business is critical for success. So is leveraging powerful technology to efficiently aggregate, analyze and interpret data for better decision-making and insights. Add to that the pressure to drive constant innovation, cost efficiency, regulatory compliance and nontraditional competitors. Let CDW Financial Services help you find the most advanced high-performance technologies and solutions that will keep you on the leading edge of the industry.

CDW for Insurance

Upgrading antiquated customer experiences is a top priority, but legacy systems can hold you back. You need the tools to access deeper customer insights, analyze risk, fraud, potential catastrophe, variable annuity modeling and drive innovation. All while keeping a close eye on costs. We know that's a lot for any IT team to handle. CDW Financial Services can help you build an IT infrastructure that supports even the most complex analysis and modeling.

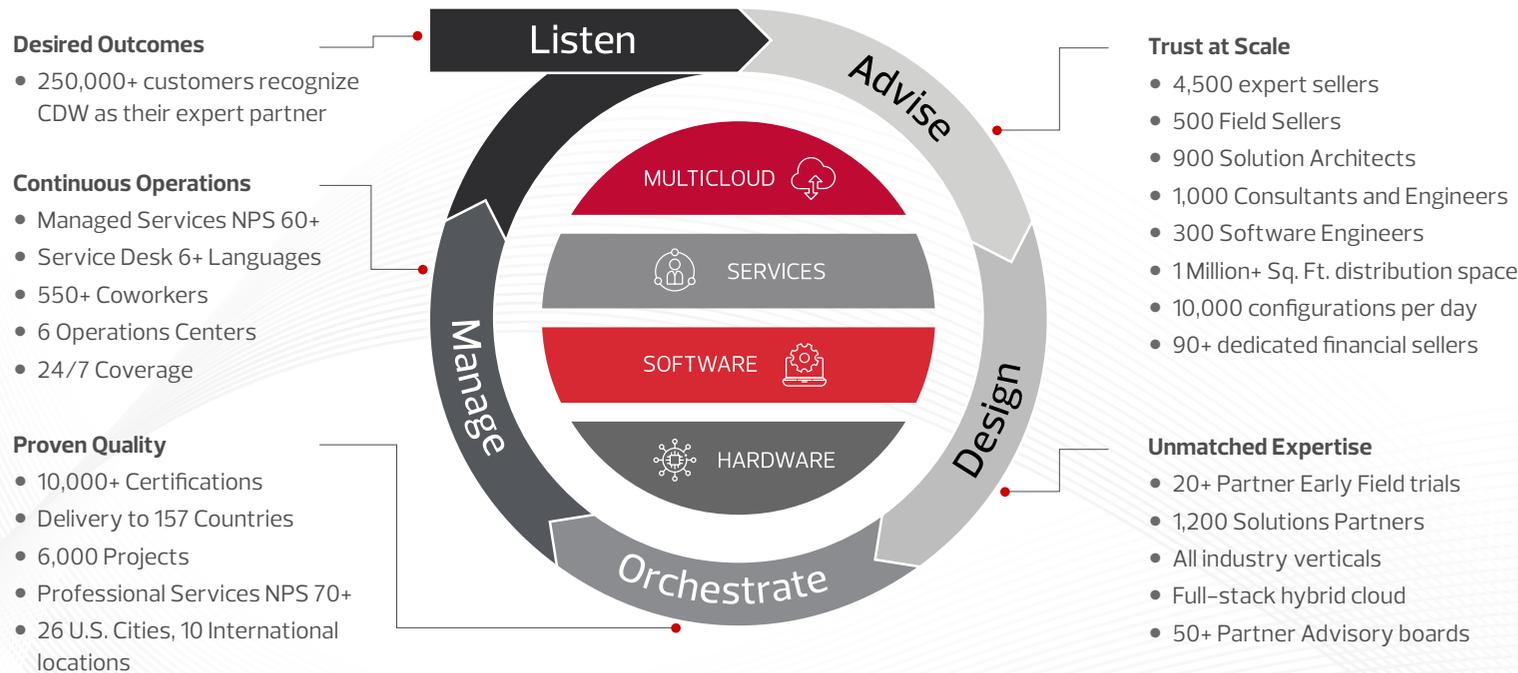




The CDW Approach

Leveraging technology to drive innovation and achieve business outcomes is a big undertaking. At CDW, we support the full stack and are able to offer support that simplifies your IT process.

FULL STACK. FULL LIFECYCLE. FULL OUTCOMES.



Working with 250,000+ customers, CDW provides IT partnership expertise to listen to each organization and help them achieve their desired outcomes. We take a thoughtful approach to assisting you at every stage of your technology journey.



Environmental, Social, Governance (ESG) Framework

ESG is an extension of our CDW Way values. Our framework is categorized into three focus areas under the unifying banner of IT Matters: Sustaining, Engaging and Inspiring. Our approach to disclosure is informed by leading global standards, including the Sustainability Accounting Standards Board (SASB) and the Global Reporting Initiative (GRI) and includes sustaining a successful business and healthy planet, engaging our coworkers, communities and partners, and inspiring trust and confidence in all our stakeholders.



CDW Services

We understand you need more than technology – you need a partner who can guide you in developing forward-thinking strategies that address employee expectations. Your dedicated CDW account team works closely with you to offer services to ensure your technology’s performance and investment continues to add value well into the future.

Core Services

CDW offers a full lifecycle of services:



Design

Based on a breadth of tools and data, and years of experience, we assess your specific needs and make expert recommendations that enable you to capitalize on new digital opportunities.



Orchestrate

Our experts configure and deploy solutions to help you implement the right technology and ensure it works from day one.



Manage

24/7/365 support and technology management can save you time and money by augmenting the bandwidth of your internal IT team.



CDW Amplified™ Services

We also provide CDW Amplified™ Services in several key areas:

Infrastructure – Get the expertise, tools and resources to scale and future-proof your data center architecture. Leveraging the experience of 300+ certified engineers, we help you upgrade your existing architecture and prepare for what’s to come, whether you’re on-premises, migrating to the cloud or already there.

Workspace – Our design and planning workshops help you create a unified communications and collaboration platform that’s scalable, intuitive and embraced by staff. We help you optimize communication, productivity, responsiveness and workflow efficiencies, and can remotely support and automate your communication platforms to ensure constant connectivity.

Security – Receive independent evaluations of your security posture to help fortify weaknesses. CDW Amplified™ Security consultants leverage a portfolio of services to identify and assess IT network security risks, increase threat visibility and prepare your organization for an evolving threat and cybersecurity landscape.

Support – From service desk to tech support, contract resources to monitoring, CDW Amplified™ Support services deliver custom warranty and maintenance services that augment your IT staff, so they can focus on maximizing business outcomes.

Data – Make more data-driven powered by artificial intelligence (AI) and machine learning (ML) services. CDW can help you gain actionable insights that give you a competitive advantage. Design, build and deploy modern data analytics and AI/ML solutions for storing, transforming, discovering and operationalizing your data.

Development – CDW Amplified™ Development Services can modernize your applications, streamline delivery through DevOps, and write custom, cutting-edge apps that drive your operations forward with greater speed, accuracy and confidence.

CDW ServiceNow® Solutions



IT Service Management and digital workflow platforms are rapidly becoming a cornerstone of IT. As a ServiceNow® Elite Partner and the 2021 Elite Segment Partner of the Year – with a leading CSAT score of 4.42 or above (out of 5) – CDW helps you optimize the value of your ServiceNow investment and streamline IT operations across your organization.



Machine Learning

Advanced analytics power financial services organizations to new levels of competitive success. CDW Financial Services can help you turn Big Data into smart data by tapping the power of AI, machine learning and powerful analytics systems to break down data silos, predict customer behavior, reduce risk and find new areas of business growth. Specific solutions include software platform, hardware components and implementation and configuration services.

- **Artificial intelligence**

Get deeper insights into customer needs, wants, habits, risks and more. Glean valuable information from structured and unstructured data.

- **Machine learning software**

The brains behind the hardware. Your team will generate more models, more accurately, than traditional analytical and programming approaches with real-time analysis and decision-making for powerful insights, increased efficiency and reduced costs.



The Power of Analytics

Challenge: An Indiana-based bank was utilizing a legacy reporting tool to gather insights about its customers. However, this tool was not performing optimally. Recurring maintenance costs were beginning to skyrocket and the customer details collected only provided limited insights on what offers to share with customers.

Solution: Based on multiple calls with CDW and PMSquare, it was determined an upgraded solution would work best to solve the company's business challenge. Working closely with PMSquare, a local analytics provider, CDW conducted successful discovery and POC. The company ran the utility live in their environment for 30 days and immediate customer insights were discovered.

Outcome: This analytics solution touched distributed services, branch managers and its internal analytics teams. CDW now has a stronger relationship with the bank, with added interest in CDW solution support. In the coming months, CDW will work with the company on a data warehousing project and branch server refresh.

High-Performance Computing

AI driven by high-performance computing is opening a new frontier for financial services. Combining deep thinking and machine learning with powerful supercomputing can help automate complex tasks and decision-making processes for every segment of the industry. Whether you need to power up analytics and processing, better manage data volumes and compliance reporting or increase profitability, we can recommend the right HPC solution or service for you.

- **Fraud detection**
Use AI technology to harness data, machine learning and supercomputing to monitor millions of financial transactions and uncover fraudulent behavior.
- **Ultrafast processors**
Reduce latency from microseconds to nanoseconds.
- **Network optimization**
Improve performance and traffic flow of critical applications, and increase speed, quality of service and security. Solutions include WAN/application optimization, next-generation networking, wired and wireless.
- **Server optimization**
Run multiple virtual operating systems and applications independently on a single machine. Experience continuous uptime, dynamic load balancing and resource allocation. Form factor options include blade racks and tower servers.
- **Data storage/management**
Create a powerful platform for managing structured and unstructured data. Streamline data retention policies and design a flexible, secure and easy-to-manage data storage blueprint. Specific solutions: Direct-attached storage (DAS), Network-attached storage (NAS), Storage area network (SAN), Unified storage, Software-defined storage (SDS), Object storage software, Flash storage and Hierarchical storage management.
- **Cloud**
Scalable, flexible and easily expandable to meet changing needs. Integrates data from multiple sources, helping to drive effective analytics.





Hybrid Infrastructure

As technology plays an ever-increasing role in shaping the customer and member experience, financial services organizations need an infrastructure primed to support growing demand and evolving needs.

CDW can help you design and deploy an infrastructure modernization strategy that refines and future proofs your data center through up-to-date storage, networking and computing infrastructure, hyperconverged infrastructure that combines computing power, networking, storage and virtualization capacity into a single, on-premises solution, software-defined data center (SDDC) that enables you to virtualize all networking components and cloud.

- **Cloud solutions**

We work closely with you to assess your infrastructure, application and data needs; security requirements; and overall cloud readiness. Based on the needs identified, we can help you build a hybrid or on-premises cloud solution, capitalizing on technologies.

- **Network optimization**

Optimizing network performance across the access layer, distribution layer and network core enables you to maximize load balancing, minimize latency and packet loss, and monitor bandwidth management. By implementing next-generation networking that improves bandwidth, security and efficiency, you can ensure you don't hamper productivity or limit adoption of new applications.



- **Data center optimization**

Every IT modernization effort must incorporate up-to-date storage, networking and computing infrastructure. Solutions ranging from multi-tier storage systems to cloud storage options can expand your storage capacity. High-performance computing is essential for turning massive amounts of raw data into actionable insights, supporting the business intelligence and data analytics key to more strategic decisions and defense mechanisms.

- **Vendor consolidation**

This can provide financial services organizations with substantial ROI by saving time and money, as well as reducing regulatory burdens. It can also enhance customer loyalty by elevating user experiences. Vendor consolidation can be driven by C-level demands and a formal RFP process or by IT's desire to simplify vendor relationship



Digital Velocity Solutions

In today's competitive market, the speed of digital priorities is critical to success. With more than 250 engineers and two of the world's 20 Google Cloud Fellows on staff, CDW is your trusted, technical services partner when results and velocity matter. Our expertise includes Certified Kubernetes Architects to Cisco DevNet Professionals behind a full-stack software development practice.

management. CDW's deep understanding and expertise means that we can help your organization successfully navigate a vendor consolidation initiative to scale up vendor engagements, gain efficiencies, extend your staff and limit your risk exposure.

- **M&A**

Mergers and acquisitions are complex processes that impact business processes, people and technology. IT compatibility, IT infrastructure longevity and overall IT security are all crucial for success. CDW Financial Services can support your organization through every phase of the M&A journey, including help with project management and consulting, software asset management, security assessments and managed services.

Financial Market Company Streamlines M&A IT Integration

Challenge: After completing an acquisition that would expand its footprint globally, an American financial market company realized that the scope and demand of the IT integration would be sprawling.

Solution: CDW held preliminary conversations with the customer to understand the full scope of the integration and each of the roles involved. Working with an international team, CDW gained a thorough understanding of what was needed to expand the customer's data centers into six new countries and expand its domestic data centers in the U.S.

Outcome: CDW developed a global plan to roll out the data centers, including outfitting each location with compute, networking and storage equipment. In addition, CDW managed the global implementation of equipment and storage arrays in each country.



Security

Complicated regulations, strict compliance requirements and evolving cyberthreats create significant risk for depository institutions, capital markets firms and insurance firms. A comprehensive security solution helps you better manage risk and comply with regulatory mandates by deploying the most advanced technology, which helps protect your customers/ members/clients against internal and external threats in a cost-effective way.

- **Uncover risks**

With assessments and testing that include security and vulnerability assessments, penetration testing, external perimeter testing, internal and wireless assessment and compliance gap analysis.

- **End-to-end security**

Understand which people and devices are accessing your network and are presenting a physical threat. Next-generation firewalls and unified threat management, IDS/IPS, security information and event management, email and web security, advanced malware protection, video surveillance and network access control and authentication make sure your infrastructure and your physical location is lock tight.

- **Data loss prevention**

Protect sensitive data in use, in motion and at rest with endpoint protection and encryption.

- **Mobile security**

Enable employees to securely connect whenever and wherever they want with network access control, authentication, VPN architecture and mobile device management.

- **Security as a Service**

Cloud-based security versus on-premises solutions include endpoint protection, hosted email and web security.



Diversity Supplier Program

CDW's deep experience, expertise and commitment to diversity excellence is critical to our ongoing success. We invest time building partnerships with our diverse suppliers and in working side by side with them to serve our customers, through the use of video and other technology.



Customer Experience

Meeting customer demands for 24/7 access, personalized engagement and seamless interaction across every touchpoint requires a scalable and dynamic IT infrastructure. We can provide the right services and support to ensure the branch experience and everything beyond exceeds customer expectations.

- **Branch**

Power up your branch to help solve customers' more complex transactions. Provide end-to-end service via bankers with mobile devices. Remote experts enabled by videoconferencing solutions. Digital signage and self-service kiosks to streamline the customer experience. Solutions include digital signage and content management, telepresence, beacons, videoconferencing/collaboration tools, self-service kiosks, desktops and displays, and mobile technology.

- **Online**

Assist customers 24/7 using web-based access to the information and transactions they wish to make at the right time and location for them. Provide seamless messaging – email, video and IM/presence – with content sharing. Solutions include desktops and notebooks, mobile technology, source web-based access and wireless networking.

- **Mobility**

CDW experts can help you assess, design and optimize your wireless network platform, then select and activate the mobile devices that will

meet the needs of your staff, customers and even their customers. Solutions include mobile technology (smartphones, tablets), ATM, mobile app development and wireless networking.

- **Contact center**

Traditional call centers are maturing into multimodal customer engagement centers (CECs) that support phone, web chat, email and mobile text communications. Solutions include unified communications tools (voice, email, chat, video), software solutions (CRM, analytics), telephony, desktops and displays.

- **Legacy ecosystem transformation**

The legacy ecosystem has become the biggest barrier to delivering a satisfying omnichannel experience. Transform your IT infrastructure with the right servers, network switches, hard drives, storage networking and virtualization solutions that are secure and compliant to deliver customers and members with a perfect experience every time, no matter what channel they choose.





Get Started on the Road to Success

Today, IT creates business potential, drives growth and innovation, but it's not always easy to stay up on the latest IT advances when you carry a heavy load. We get it. CDW Financial Services partners with the industry's leading technology companies to bring you the state-of-the-art IT solutions you need to succeed and lighten your load.

CDW is a trusted technology partner to more than 20,000 financial services organizations

- Supports **99%** of the top U.S. banks
- Supports **55%** of the top U.S. credit unions
- Supports more than **7,500** U.S. capital markets firms
- **75+** dedicated CDW Financial Services account managers



Partners

As a top partner for the industry's leading hardware and software providers, with a pulse on emerging technologies, we're able to offer a variety of solutions and services to meet your unique networking needs.



To simplify the complex and modernize your IT platform, contact your CDW account manager or visit [CDW.com/finance](https://www.cdw.com/finance).