

# TRANSFORMING BANKING AND FINANCIAL SERVICES WITH VIDEO



**KALTURA**

Video is instrumental in our daily lives and increasingly it's becoming an important part of how we do business. Leading banking and financial institutions are now leveraging audio and video across the organization, keeping employees informed of ever-more-stringent regulations and increasing cross- and up-selling opportunities. Video content helps capture key details and facts, making an effective knowledge sharing and training tool. Whether it's broadcasting market information or spreading best sales practices, people find video a more engaging and effective way to communicate.

## VIDEO OPPORTUNITIES IN BANKING & FINANCIAL SERVICES

**Banks and financial institutions are using video solutions like Kaltura Webcasting, Kaltura's MediaSpace Video Portal, and more, to streamline processes throughout the organization, including:**

### Marketing and Customer Service

- Engaging client outreach
- Centralized marketing materials for increased upsell and cross-sell opportunities
- Video-based customer interaction for high net worth clients, creating a greater sense of personal connection
- Regulated environment call monitoring and storage

### Training

- Regulatory accreditation training videos with options for localization or multilingual closed captioning
- Video tutorials for banking procedures, how-to screencasts, HR benefits, payroll information, and more
- Specialized training modules for traders' certification

### Knowledge Sharing and Brokerage Compliance

- Broadcast and capture of regulated, just-in-time economy and financial markets video podcasts, brokerage daily updates and deal sheets
- Knowledge transfer and collaboration between international teams

### Branch Operations/Security

- Capture and manage video surveillance of branch locations
- Capture lawsuit 'slip and fall' investigation videos

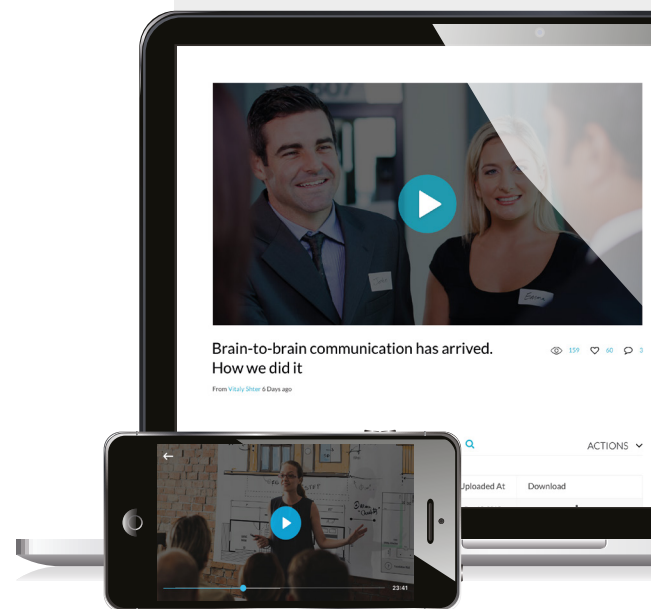
### Surveillance

Unified video surveillance of

- Vaults
- Trading floors
- ATMs, Branch Offices

## BENEFITS

- Improve customer retention with engaging content
- Maintain video-based evidence for audit/regulatory compliance
- Reduce costs and increase accountability with online video training
- Increase cross-team collaboration and communication
- Centrally manage video across the organization through a single, entitlement-governed hub
- Reduce expenses by eliminating content siloes
- Improve productivity with high quality content, anywhere, anytime, on any device



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## KEY CAPABILITIES

- **Lifecycle governance:** Automatically age out older materials at the regulated age, or flag documents to be held as necessary
- **Security:** Fine-grain access control and content segregation
- **In-video search:** Create searchable, automated transcriptions and synched slides to make content easy to find
- **VOD or Live:** Provide the optimal video experience for video delivery on demand as well as reliable, high quality, low-latency broadcasting for live events, such as webcasting
- **Easy video creation tools:** Capture and edit webcam recordings, screen captures, and synched PowerPoint presentations from the desktop
- **Any device:** Responsive design and adaptive bitrate HTML5 delivery for optimal delivery to any device or screen
- **Multiple hosting and deployment options:** Cloud-based, on-prem, or hybrid solutions



**Different branches of banking may have different needs, but all can benefit from video's ability to create engaging, personal communication.**

### **Retail Banking**

- Share the best practices of successful sales reps
- Enhance internal and external communications and marketing
- Unify regional and multinational sales efforts

### **Capital Markets**

- Replace morning economic and markets calls with podcasts
- Maintain records of video training & communications to comply with regulations

### **Asset Management**

- Build more personal relationships with high net-worth clients through video communication



## **The Benefits of Centralization**

For institutions with more than one location, a single centralized content management system allows marketing, communications, and training materials to be shared across the full institution. However, strict permissions-based access rules can maintain separation required to prevent regulatory missteps. By creating robust lifecycle governance policies, automatically comply with regulations while streamlining workflows.

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## ABOUT KALTURA

With the mission to power any video experience, Kaltura has emerged as the fastest growing video platform. Kaltura is deployed globally in thousands of enterprises, media companies, service providers, and educational institutions and engages hundreds of millions of viewers at home, at work, and at school.

For more information visit: <http://corp.kaltura.com/Industries/Video-for-Financial-Services>

**Get in touch:** Call us at +1-800-871-5224, or fill out this form <http://corp.kaltura.com/company/contact-us>

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