

Financial Services Solutions





Communication solutions that are right on the money

Financial services providers have unique, dynamic requirements that demand more than a “one size fits all” approach to business communications. You need a partner that understands how your business operates, what your customers expect and how to serve their needs. Mitel is dedicated to providing tailored, industry-specific and user-centric solutions to help you improve business performance, gain a competitive advantage and maximize your return on investment.

Our approach is unique. We see business communications as an investment in ongoing performance – not a one-time equipment acquisition. Mitel’s advanced IP-based communications solutions leverage a single infrastructure for converged services like voice, video and data, giving you access to advanced features, functions and applications designed to meet your specific needs. With unmatched reliability and scalability, our business communications solutions help you:

- **Save money** with standards-based IP communications platforms and applications that help you work better, faster, smarter; reduce operational costs; improve cash flow management; generate new revenue streams; and let you leverage your existing communications infrastructure as you transition to more advanced capabilities – when your business needs dictate.

- **Stay connected ... anytime, anywhere** with flexible work, mobility and collaboration tools that break down the barriers to effective communication.
- **Excel in customer service** with 24/7 availability, first-call resolution, seamless connectivity, and monitoring and management tools to maximize your resources.

- **Be green** with eco-friendly, IP-powered applications and products made from recyclable materials designed to use less electricity and reduce energy costs.

Simple, flexible solutions for managing the customer experience

Mitel understands that time is money. Banks, credit unions, mortgage brokers, insurance companies, brokerage firms and other related businesses rely upon real-time information and instant communication to satisfy customer needs and serve their own business objectives. Mitel can help financial services providers to differentiate their offerings, enhance customer service, improve profitability and control expenses with:

Customer Interaction Solutions to increase the productivity of your staff so they can give your customers more professional, personalized service; create new revenue opportunities; improve client response time and satisfaction; and simplify compliance with mandatory federal and state regulations.

Unified Communications Solutions to help you better manage your overall communications and gain a competitive advantage by improving staff efficiency and information flow for every individual in your organization.

Mobility Solutions featuring wireless capabilities to extend your voice and data communications with true anytime, anywhere access, regardless of your location.

TeleCollaboration Solutions that enable real-time collaboration, Web-based meetings, presentations and staff training, and eliminate the high cost of travel and outsourced services.

Managed Services Solutions to give you an intelligent, built-in migration strategy that protects your existing and future communications investment for years to come and to help you better manage your cash flow now.



Flexible, Scalable, Secure Solutions for Financial Services Providers

- Embedded feature sets, including voice mail, auto attendant, customized greetings, call recording, MOH, WiFi
- Integrated, easy-to-use applications that enable staff to be trained quickly
- Intuitive, user-friendly consoles, desktop and wireless handsets for more professional, efficient call handling
- Industry-leading architecture to eliminate single point of failure, resulting in more reliable, secure communications
- Seamless integration with most third-party applications
- Cost-effective scalability for distributed organizations with up to 65,000 users and enterprises with fewer than five to more than 1,000 users with IP and/or analog phones
- Unparalleled customer service and support from Mitel's local branch offices and network of more than 1500 certified resellers

Customer Interaction Solutions

Build brand and customer loyalty

A photograph of two men in dark suits shaking hands in a modern, brightly lit lobby. The walls are made of large, light-colored stone or concrete panels. The floor is a light-colored tile with a grid pattern. The scene is captured from a low angle, emphasizing the height of the space. A blue curved graphic element is overlaid on the top left of the image.

“When we examined the numbers, the value of the Mitel solution far surpassed other leading PBX manufacturers. Through Mitel’s Managed Services Program, we save in the neighborhood of \$5,000 per month compared to traditional purchase options. It’s given us the ability to leverage a powerful, advanced communications platform that will serve our needs well into the future ... and most importantly, we are much more responsive to our members’ needs.”

Union Square Federal Credit Union, Wichita Falls, TX



Good customer service is money in the bank. How can you continually improve service so your customers keep coming back? How do you give customers what they want while remaining competitive and driving costs down? Mitel's Customer Interaction Solutions offer true flexibility to help you respond quickly to your customers' needs with scalable, intuitive, Web-based applications that enable you to give customers that "personal touch," wherever and whenever you do business.

Delivering the highest level of customer service – consistently, expeditiously and efficiently – is a constant challenge for financial services organizations. Mitel's presence-based call routing technology automatically directs incoming calls to the next available or most appropriate person or department. Mitel Contact Center Solutions also integrate with a number of customer databases to give your staff immediate account information on incoming callers. In addition, our call reporting and tracking tools allow supervisors to view a number of performance metrics, including call completion rates and time on hold. Calls also can be recorded to support both training and compliance objectives.

Our intelligent, user-friendly solutions help you:

- Provide superior, personalized service with screen-pop data from your CRM such as account balances, recent transactions and customer service history
- Generate additional revenue-producing opportunities with outbound dialing and on-hold messaging capabilities to implement and manage highly targeted advertising and marketing campaigns
- Increase online sales, create up-selling opportunities and lower support costs with customized interactive voice response (IVR) solutions
- Ensure prompt customer service by monitoring calls and queues for quality assurance and adequate response times
- Improve operations and reduce costs with skills-based scheduling tools and labor cost reports
- Centralize calls to provide best-of-class answering services
- Facilitate easy access to the right resource at the right time, wherever and whenever they are needed
- Leverage a distributed workforce to deliver superior customer service from anywhere
- Empower employees to provide first-call issue resolution to enhance the customer experience and increase customer retention
- Improve and maximize employee training
- Comply with mandatory federal and state regulations

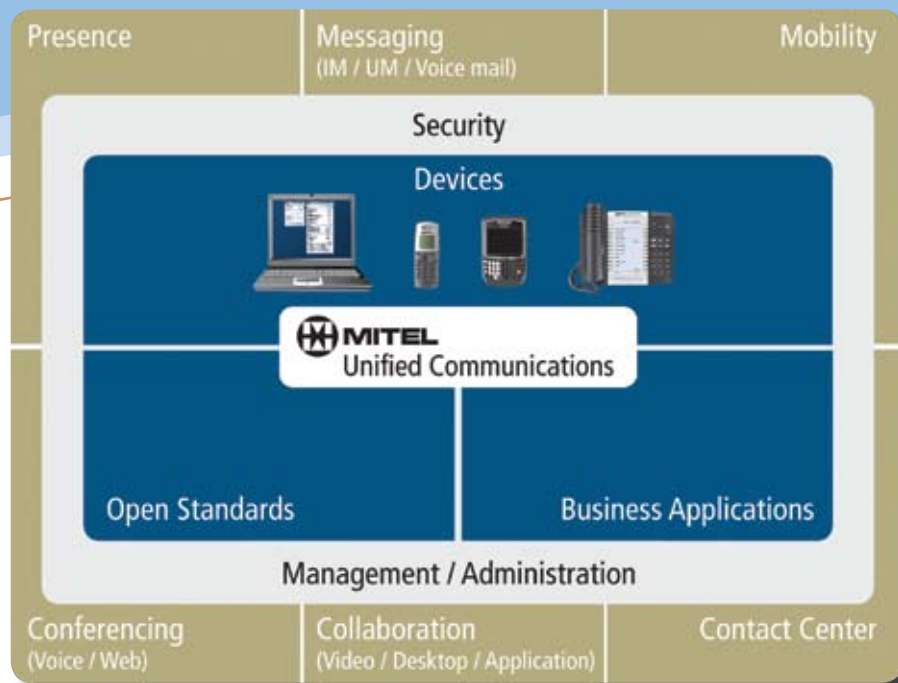
Unified Communications Solutions

Simplified communications management



"Unified Communicator has been a great asset in improving the efficiency of our company. Its rich features and flexibility have been instrumental in our ability to streamline communications both internally and with our clients."

Katz, Sapper and Miller, Indianapolis, IN



Managing the volume and complexity of communications is critical to your success. Respond to your clients' needs faster and more efficiently by integrating voice, video and data together on your network to improve the flexibility and intelligence of your communications systems.

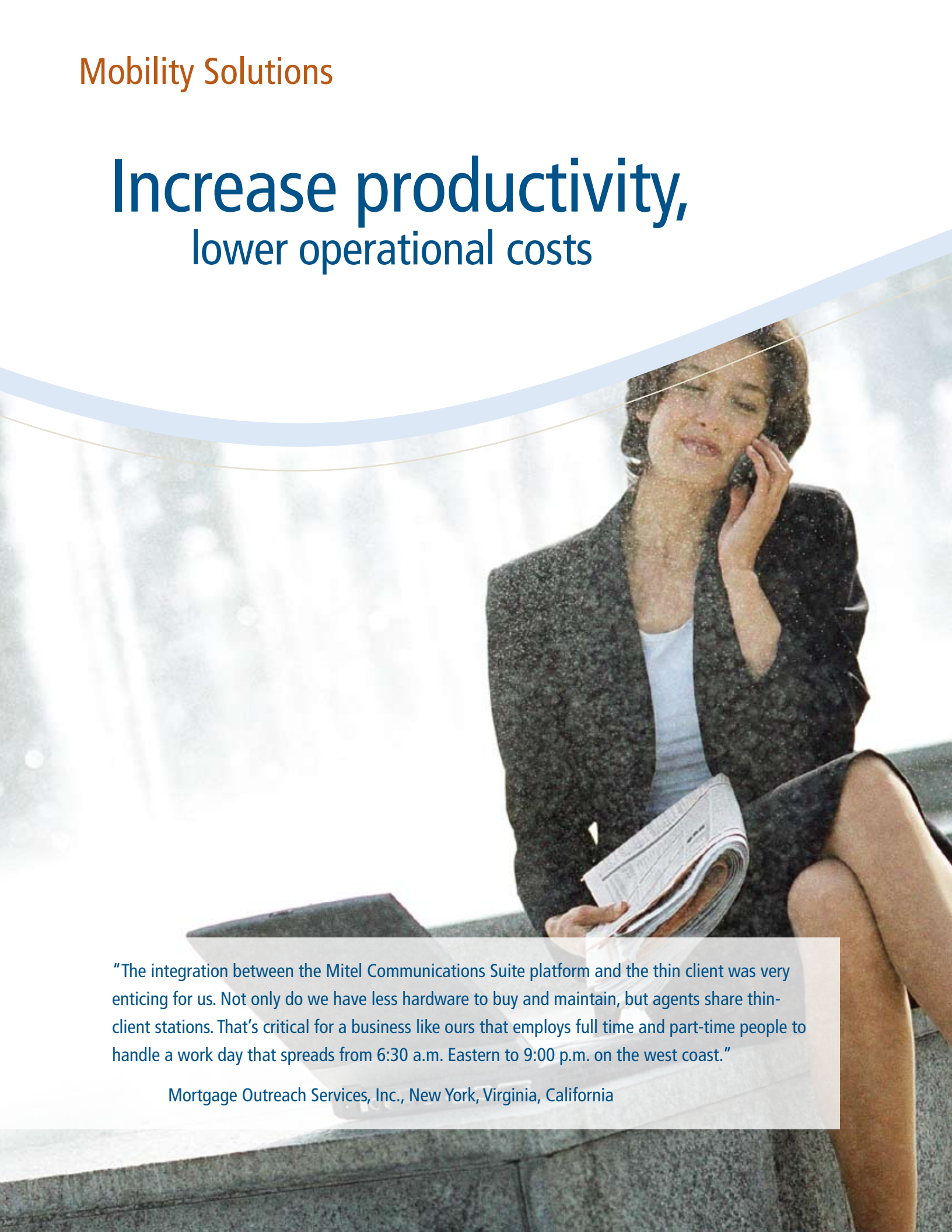
With data, voice and video all on the same network, financial services providers can access information and applications wherever they are – and promptly respond to client requests via their preferred method of contact. Mitel's Unified Communications solutions provide powerful and effective tools to streamline communications and keep your office operating at peak efficiency while allowing you to seamlessly add new productivity-enhancing functionality and revenue-generating opportunities available via today's IP-enabled communications.

It all adds up. Mitel Unified Communications Solutions give you a competitive advantage by:

- Integrating your communications devices, messaging media, directories and interfaces so you spend more time communicating and less time managing your communications
- Reducing costs and improving customer service by automating some of your most common, resource-intensive business processes
- Improving accessibility and responsiveness by controlling how, when and by whom you are reached
- Increasing communication and service levels with multi-language capability
- Easily managing communications and lowering your total cost of ownership
- Cost-effectively adding applications, features and capacity to your existing infrastructure as your business needs dictate
- Enhancing security for your customers and employees
- Reduce the impacts of churn by providing flexible working capabilities that increase employee loyalty and help you protect your investments in training and recruitment

Mobility Solutions

Increase productivity, lower operational costs

A woman in a dark, textured blazer and light blue top is sitting on a grey stone ledge. She is holding a mobile phone to her ear with her right hand and a stack of newspapers with her left. The background is a bright, out-of-focus cityscape. A light blue curved graphic element is positioned above her.

“The integration between the Mitel Communications Suite platform and the thin client was very enticing for us. Not only do we have less hardware to buy and maintain, but agents share thin-client stations. That’s critical for a business like ours that employs full time and part-time people to handle a work day that spreads from 6:30 a.m. Eastern to 9:00 p.m. on the west coast.”

Mortgage Outreach Services, Inc., New York, Virginia, California



Anytime, anywhere access

Wherever your customers are, wherever your employees need to be, Mitel Mobility Solutions are a smart investment to help keep everyone connected, working and moving while reducing one of your IT department's biggest expenses – mobile phone costs.

Mitel® Communications Director call control software, with the embedded Mitel Dynamic Extension solution, runs on the Mitel 3300 IP Communications Platform (ICP) or industry standard Sun, HP and IBM servers. And it works with any mobile or fixed device, over any network, with any carrier. Keep all your legacy telephones and use the Mitel solution as a gateway to upgrade the performance of your existing business communications system by easily adding advanced mobility and IP telephony functions. Mobile workers can select up to eight devices, regardless of make, so calls to their business number can ring on a mobile, home, or remote office phone, or on any other device they choose. All business calls from the mobile devices are routed through the business PBX and billed to the company – no more complicated SMDR records for IT, and personal calls can remain the responsibility of the user.


In addition, Mitel's Mobility Solutions offer presence and availability information that allow your staff and clients to reach the right person, at the right time, using the right device, when they need immediate answers. No endless phone tag or annoying delays caused by returning to a central message desk. Even more importantly, Mitel offers a variety of mobile communications solutions to help ensure the safety and security of everyone in your office, including on-site Emergency 911 alarm notification to your system's main console, display sets and Mitel-supported 802.11 wireless telephones.

Mitel Mobility Solutions provide you with greater accessibility, cost savings and control over your communications, allowing you to:

- Hot desk to any device, even those external to the corporate network
- Dial and receive calls from your office extension no matter where you are
- Connect to any network, even third-party legacy networks
- Twin to any number, device and network
- Stay in real-time on any device, anywhere in the world
- Keep your existing legacy architecture (no rip and replace)
- Reduce roaming charges by pushing calls to other devices without interrupting the conversation
- Route all employee business calls through the corporate network
- Use any brand and type of mobile phone without additional client software or hardware
- Increase mobility support without the need for an additional server
- Switch devices, networks, or communication methods with just one button
- View all mobile call activity in a single location
- Maintain one voice mail box for up to eight devices
- Be mobile and enjoy the same features and applications as in the office
- Have a single identity that is easy to manage and control

TeleCollaboration Solutions

Collaborate, communicate, improve decision making



Communication and collaboration are the keys to providing the level of service your customers demand. Get everybody working together – regardless of their location – easily and cost-effectively, with Mitel's IP-based TeleCollaboration Solutions.

Share ideas and information and improve workgroup collaboration so decisions can be made quickly and efficiently, in a real-time environment. With easy-to-use tools such as unified communications clients, audio, Web and video-conferencing solutions, as well as telephony integration with Microsoft® Office Communications Server 2007, you can conduct timely, highly interactive online meetings and training sessions, and easily schedule conference calls “on the fly” with productivity-boosting tools such as desktop and application sharing, white boarding and Internet co-browsing.

Streamline business processes, improve customer care, enhance employee productivity and reduce expenses with time-saving applications for “better than live” communication and collaboration that:

- Enable intuitive communications and collaboration with individuals anytime, anywhere
- Extend relevant and powerful communications and collaboration capabilities to mobile employees
- Improve decision-making through better access to information and people
- Create a presence-enabled, business-centric communications environment
- Ensure secure and highly reliable communications throughout your network
- Reduce costs by eliminating travel and fees for outsourced hosted conferencing services

Unified solutions for all your communications needs

Maintaining today's advanced communications systems can be an overwhelming, expensive and time-consuming experience. There are endless moves, adds and changes; software upgrades; integration of new applications and technologies; carrier issues – and the inevitable service calls that must be scheduled and monitored. All the while, your communications costs escalate as the residual value of your system declines. It's no wonder so many businesses now rely on Mitel's Managed Services program to handle everything.

Mitel addresses your unique communications needs with a true managed services philosophy to ensure you get the most out of your communications investment, including

- Hardware and software
- Data networking solutions
- Managed network services
- Financing and service options
- Third-party solutions

Mitel is unique in offering comprehensive support – from evaluating your existing systems to designing, installing and managing your communications infrastructure, with easy transitions to future devices, capabilities and business models – to help you better manage your cash flow, protect you from technology obsolescence and optimize your return on investment over the next five to 10 years.





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