

# INCREASING BUSINESS FLEXIBILITY AND CUSTOMER SATISFACTION



“IONA’s Orbix™ has allowed FINEOS to deliver to multiple channels on multiple platforms ensuring scalable, resilient systems for our customers.”

- Dave Solan, Technical Architecture (TA) Product Manager, FINEOS Corporation

## BUSINESS PROFILE

### FINEOS

Providing enterprise solutions for banking and insurance

### INDUSTRY

Financial Services

### IONA PRODUCTS

Orbix

### BENEFITS

- Increases speed to market
- Reduces development time
- Increases customer satisfaction
- Integration by design based on open standards
- Component-based architecture that is easy to deploy
- Enterprise quality, reliability and scalability

Headquartered in Dublin, Ireland, FINEOS is a leading provider of enterprise software solutions for the banking and insurance industries. FINEOS was established in 1993 to develop and market a new generation of enterprise solutions for the retail banking and insurance sectors. FINEOS boasts an impressive client list that encompasses some of the world’s leading banks, mutuals and insurance companies including Skandia, Canada Life, The Britannia Group, Northern Rock, Eagle Star, and ABN AMRO. For the past four years, FINEOS has experienced a growth rate of 400 percent. The company employs 250 staff at its offices in Dublin, the UK, The Netherlands, Scandinavia, and the United States.

FINEOS’ vision is to become a leading provider of core sales, servicing, workflow and administration software solutions to financial organizations throughout the world. The FINEOS Technical Architecture (TA) is core to the design of the entire FINEOS suite of component-based financial services software applications.

FINEOS had specific objectives for its TA. FINEOS needed an architecture that would scale. The solution that it provides to its customers needed to be capable of supporting many thousands of users, using different access methods with each wanting their own tailored view on information. From access by the sales force out in the field using laptops, to branch and head office users accessing via the Web, the solution needed to be capable of providing specific value to every customer.

Availability, scalability, reliability and performance were also key objectives of the architecture design. FINEOS’ customers require accurate, timely information from fast, efficient systems in order to streamline processes and increase the efficiency of their operations.

FINEOS wanted to avoid technology lock-in and provide a solution that ran cross-platform and cross-language. This allows FINEOS to market its products to a broader user base, without constraints on platform or language support.

FINEOS selected IONA’s Orbix because it enabled FINEOS to meet the specific objectives of its TA.

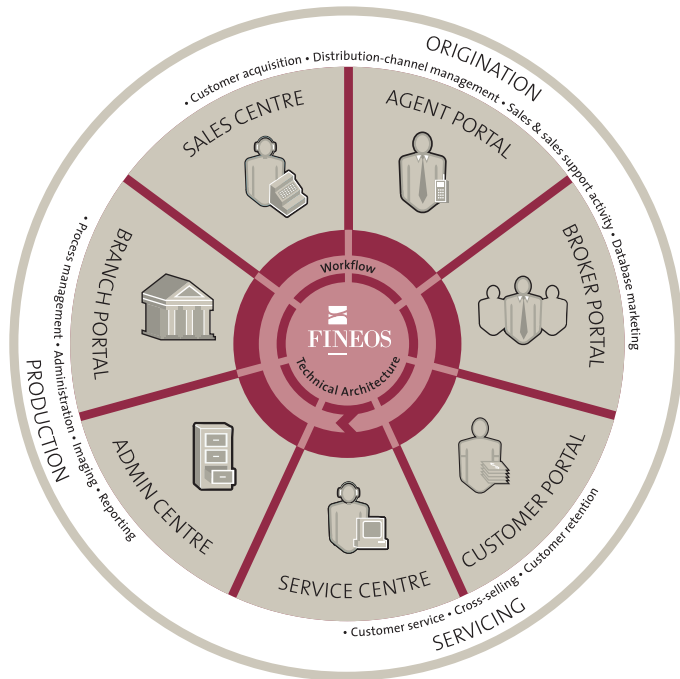
“We wanted to create an architecture based on CORBA and J2EE, as they are open technologies and enable us to create a cross-platform, cross-language solution. We chose IONA as it is the market leader in this space,” says Dave Solan, TA Product Manager, FINEOS Corporation.

## THE BUILDING BLOCKS OF FINEOS SOLUTIONS

FINEOS solutions incorporate CRM (Customer Relationship Management), business process automation, and product management systems. These solutions are designed to address specific enterprise business challenges in the areas of distribution, servicing, and product management. Distribution is about customer acquisition. Servicing is about processing new business, alterations, claims and other service issues. Product or contact management covers the design, development and administration of financial products, including new business, underwriting, alterations and terminations.

FINEOS software optimizes business performance, reduces operating costs and improves customer service. This helps its customers tackle the opportunities and challenges they face to enable their business strategy and provide a powerful differentiator.

Each one of the FINEOS’ financial products is built on the FINEOS TA that in turn is built on IONA’s Orbix.



From the middle tier, FINEOS TA can integrate with legacy systems, such as mainframes, UNIX and AS/400. Orbix is then used to deliver this information to the client tier. This extends the market for its product and allows customers to use their existing investment in their infrastructure.

Security is also paramount to FINEOS, because the financial industry demands that all transactions are validated and secure. Using the Orbix allows FINEOS to provide an in-built FINEOS TA Security Service. This allows applications to be deployed in a secure environment providing authentication, integrity, access control, and non-repudiation.

## IONA PROVIDES THE FOUNDATION FOR FUTURE FINEOS PRODUCTS

FINEOS plans to continue expanding its product portfolio and increasing its customer base. Recently, The Britannia Building Society, one of the UK's leading building societies, was awarded "CRM Project of the Year—Large Organization" at the CRM Industry Awards 2002. The project was carried out using CRM technology from FINEOS, built on IONA's Orbix.

Brian Merrigan, Product Vendors Partners Manager at FINEOS said, "IONA's solutions have been an integral part of our architecture for a long time and have greatly enhanced our deployment capabilities. We are confident that IONA's software will continue to add considerable value to our products in terms of scalability, flexibility, and cost effectiveness."

For more information about FINEOS, go to <http://www.fineos.com>.

## PRODUCTS

**IONA's Orbix is the most widely deployed development platform for the most demanding distributed applications in the world, combining the scalability of CORBA and the productivity of J2EE. It supports all of the major component architectures and Web services. Orbix provides a single foundation of reliability, scalability and security services for applications. It helps organizations capitalize on their existing operating platforms, programming language expertise, and legacy application investments to reduce the cost and complexity of building e-business applications.**

Orbix has also been used by FINEOS to meet their security and integration requirements.

## IONA HELPS FINEOS MEET THE OBJECTIVES OF ITS TECHNICAL ARCHITECTURE

FINEOS uses portal technology to provide user-specific views on information. Portals are available for external access, (for example, customer, broker, agent) as well as for back office, branch and contact center views of information. Components are the building blocks of portals. Each component represents a piece of business functionality such as a customer search, account details, or change address. The components are customized based on the user; for example, the end customer might see less information than the sales agent, but both functions can be delivered from the same component.

IONA's Orbix enables the FINEOS TA to be exceptionally scalable and easily customized. These components allow FINEOS to provide its end users with a properly customized workplace that improves productivity and provides a consistent user interface. By using the same component to provide this functionality, FINEOS incurs less development time. The company benefits from lower costs, better staff use, and a quicker time-to-market.

In addition, the FINEOS TA component model can be mixed and matched with the customer's own components, removing development complexity. Being able to provide tailored solutions to its customers increases customer satisfaction and allows FINEOS to provide solutions to all types of financial institution.

IONA's Orbix allows FINEOS to provide a solution that is capable of supporting thousands of simultaneous clients connecting to multiple processes. The system has the potential to be extended to millions of users ensuring that FINEOS can provide a solution that enables organizations to grow and evolve, which in turn increases sales and market share.

Product performance is essential to FINEOS. FINEOS' customers need fast, efficient systems to generate increased sales and customer satisfaction. Orbix helps FINEOS to deliver a high performance, highly reliable TA.

"Performance of our products is very important," says FINEOS' Solan. "98% of all transactions, each of which translates to multiple database transactions, execute in under half a second. This guarantees our customers a speedier and more consistent service."

IONA helps FINEOS to avoid technology lock-in and be platform/language independent. Product development is primarily in C++ and Java, and the FINEOS product suite runs on a number of Windows and UNIX platforms. The Orbix eases the J2EE and CORBA development process, allowing FINEOS to deliver to multiple channels on multiple platforms. Also, by using the latest technology, FINEOS can provide innovative and competitive offerings to its customers on whatever platform they require.

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