

# OP FINANCIAL GROUP IMPROVES THE CUSTOMER EXPERIENCE WITH FACTSET INVESTMENT DASHBOARD

> By switching its retail wealth platform to FactSet Investment Dashboard, OP was able to provide a more modern interface and better overall experience to its retail customers.



## FIRM TYPE

Regional Co-operative  
Retail Bank

## TOTAL ASSETS

€147 billion

## THE CHALLENGE

Upgrade technology to improve the customer experience and increase the number of customers trading via the platform

## FACTSET SOLUTION

FactSet Investment Dashboard

### The Challenge

OP Financial Group is one of the largest financial companies in Finland, offering retail banking, commercial banking, and insurance services. OP is a co-operative bank owned by its customers and according to Kristian Wilkman, Senior Business Development Manager, satisfying its owners/customers requires focus on more than just profits.

OP's retail clients range from new investors to heavy traders, and OP provides multiple platforms to meet their needs. The platform used by its active traders and premium customers was based on outdated technology, which caused low marks for customer satisfaction. OP knew they needed a change and after extensive research of possible solutions available in the market, OP chose FactSet Investment Dashboard for its retail and wealth customers. OP cited that the experience and additional support from FactSet and NFS sealed the decision.

### The Solution

In close cooperation with OP and NFS, FactSet's local Finnish integration partner, FactSet configured Investment Dashboard to meet OP's needs and enhanced the standard product capabilities. OP took advantage of the available customization options, including customizing the customer interface with the firm's branding, the ability to share watchlists easily between the client portal and Investment Dashboard, and trading integration with OP's online banking portal.

OP found Investment Dashboard to be especially well suited for supporting its desktop and tablet solutions. Clients appreciate the customization options the new platform allows. While OP has created overview pages within the application that clients can use as a starting point for their analysis, clients can create and maintain workspaces within the application.

Customers have provided extremely encouraging feedback on the look and feel of the updated OP application with Investment Dashboard. Clients now have a seamless and uninterrupted workflow, which is a huge efficiency gain from the previous solution. Mr. Wikman attests that the response to the new interface has been overwhelmingly positive, saying, “from day one, we have had customers complimenting the product saying that it is fresh and they like the product’s features.”

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For OP, one of the key benefits of choosing Investment Dashboard for its retail client solution was the support they received from the FactSet and NFS teams during the entire implementation process. According to OP, the support they received far exceeded their expectations, especially in the final testing phase. The OP team required a specific feature that was slated for a later release date but the development team was able to prioritize and deliver the required feature ahead of schedule.

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OP is counting on FactSet Investment Dashboard to provide the effortless digital experience that its customers are demanding.



#### The Outcome

For OP, FactSet’s software as a service (SaaS) model for providing Investment Dashboard was a perfect fit. It has proven to be a cost-effective and resource-reducing solution that has served OP’s customers well.

OP continues to analyze its customers’ behavior and interactions with Investment Dashboard. In fact, OP is currently in the process of upgrading its technical infrastructure; once this is complete, the company expects usage of Investment Dashboard to at least double. The firm is also in the process of developing a marketing campaign to reach even more customers (potentially attracting up to 50,000 new users).

With more and more customers, especially younger ones, moving to mobile (with double-digit growth in recent years), OP is counting on FactSet Investment Dashboard to provide the effortless digital experience that its customers are demanding. According to Joonas Heinola, Specialist at OP Markets, “we plan to continue expanding the Dashboard’s [trading and mobile] integration to provide our customers an even better experience.”