AVI SPL

CREATING COLLABORATION EXPERIENCES THAT STRENGTHEN CLIENT PERCEPTION



THE MODERN STANDARD FOR COLLABORATION

In financial services, every interaction can shape how your organization is perceived. Clients expect secure, responsive communication whether they join from another office, city, or time zone.

Today's Collaboration Expectations

Security

- Protect sensitive conversations and confidential information during every interaction.
- Ensure consistent security across all digital interactions and endpoints.
- Support responsive communication without adding complexity for IT.

Professional brand identity

- Present the professional image clients expect from your organization.
- Reinforce trust and confidence during every interaction.
- Deliver a polished experience regardless of where participants join.

Ease of use

- Make it easy for clients and employeesto connect from any location.
- Provide an intuitive experience regardlessof technical comfort.
- Keep the focus on the conversationinstead of the technology.

Meeting these expectations requires more than technology. It takes an organization-wide approach to managing collaboration.

SECURITY THAT PROTECTS EVERY INTERACTION

Financial services organizations are entrusted with personal and business information.

Protecting confidential conversations and shared information is a responsibility that extends into every collaboration environment.

Privacy and Compliance

Collaboration in financial services often involves sensitive information and is subject to privacy and regulatory requirements. Collaboration technology should support those obligations while protecting information wherever people connect.

Consistent Protection

Today's collaboration extends beyond the conference room. Clients and employees expect the flexibility to connect from wherever it's most convenient, without compromising security across devices and endpoints.

Manageable for IT

Security should help IT maintain consistent protection without adding unnecessary complexity.

Protecting confidential information is only one part of the client experience. Every interaction should also reflect the professionalism and reputation of your organization.



Microsoft Teams

SUPPORT SECURE, FLEXIBLE COLLABORATION

Microsoft Teams helps financial services organizations bring day-to-day communication and collaboration into a familiar Microsoft 365 environment.

Security and compliance capabilities are built in, helping organizations apply policies to the same tools employees use to collaborate. Teams keeps conversations and shared content together, so employees can return to the context behind ongoing work after a meeting ends.

Get More from Microsoft Teams

- Manage Teams through centralized policies and administration as collaboration needs grow.
- Give employees a familiar Teams experience across locations, so they can meet and collaborate without changing how they work.
- Use Facilitator with Microsoft Copilot to generate real-time notes and summarize key decisions during Teams meetings.
- Support multilingual participation with Interpreter and Microsoft Copilot through real-time speech-to-speech interpretation in Teams meetings and calls.

Explore Microsoft Teams solutions for financial services



PROFESSIONAL BRAND IDENTITY IN EVERY INTERACTION

Every interaction shapes how clients see your organization.

Whether they meet in person or join remotely, they expect communication that reflects the professionalism and reputation your organization built. Collaboration technology should help reinforce those expectations.

Client Interactions

Clients should receive the same professional experience regardless of when, where, or how they connect.

- Consultations
- Account updates
- Strategy discussions

Internal Collaboration

Employees should have a consistent experience across the organization that reflects the same standards applied to client interactions.

- Cross-team collaboration
- Leadership meetings
- Training sessions
- Operational planning discussions



THE TECHNOLOGY SUPPORTING YOUR ORGANIZATION SHOULD REINFORCE THE PROFESSIONALISM CLIENTS EXPECT WHILE REMAINING SIMPLE FOR EVERYONE WHO USES IT.

MAKE EVERY INTERACTION EASY

Collaboration technology should be easy to use so participants can focus on the conversation instead of the technology.

Whether joining from the office or remotely, the experience should feel straightforward from the start.

Participants should be able to:

- Join meetings without unnecessary steps or technical assistance.
- Participate naturally from any location or device.
- Learn the technology through a familiar, intuitive experience.

The Client Test

One way to evaluate the collaboration experience is to consider someone joining a meeting for the first time.

Can they:

- Hear and be heard clearly throughout the conversation?
- View and understand the information being discussed?
- Participate naturally regardless of location or device?
- Focus on the discussion instead of the technology?
- Leave with a clear understanding of next steps?

When technology is easy to use, people spend less time figuring out how to join and more time accomplishing what they came together to do.



DELIVER CONSISTENT COLLABORATION EXPERIENCES

Hybrid work has expanded where collaboration happens.

Employees collaborate from different offices, homes, client locations, and while traveling. Clients also join from a variety of devices and environments. While flexibility has increased, so has the potential for inconsistency.

Maintaining a consistent collaboration experience starts with intentional design and planning. Rooms can vary in size and layout. What matters is that the quality of the interaction stays consistent, regardless of where participants join.

What Consistency Makes Possible

- Join meetings through familiar workflows across every room and location.
- Deliver reliable audio and video for clients and employees.
- Create consistent meeting experiences across every office and meeting space.
- Support productive collaboration whether participants are in the office or remote.

Standardization Creates Consistency

Standardizing collaboration platforms, room technology, and user workflows helps create familiar meeting experiences throughout the organization. The technology works the way employees expect, wherever they work.

STANDARDIZE THE MEETING EXPERIENCE AT SCALE



Maintaining a consistent user experience becomes more challenging as meeting spaces expand and workplace needs evolve.

Employees still expect rooms to feel familiar and easy to use, whether they meet in a small room or a larger collaboration space. Crestron Control brings room functions into a common interface that standardizes how people interact with the technology.

Crestron Collab Compute is a purpose-built foundation for room-based conferencing. DM NVX carries AV over the network, while AirMedia adds wireless connectivity.

For IT, that consistency also makes a growing meeting environment easier to manage.

Balance Consistency With Flexible Technology

- Give employees a familiar way to control technology from room to room.
- Support video conferencing across Microsoft Teams Rooms, Zoom Rooms, Google Meet, and Cisco Webex.
- Scale AV distribution as workplace requirements evolve.
- Simplify wireless presentation and conferencing in shared spaces.

Explore Crestron solutions for financial services



GOVERNING AND SCALING THE COLLABORATION EXPERIENCE

As organizations scale, collaboration environments need ongoing oversight to stay effective. Governance is what keeps consistency and security intact over time.

What governance supports:

- Provide visibility across collaboration environments.
- Maintain organizational technology standards.
- Reduce risk as technologies and requirements change.
- Align technology investments with business goals.
- Scale without sacrificing consistency.

Growth can make collaboration more difficult to manage. Governance provides the structure needed to support new offices and changing requirements without creating fragmented experiences. Proactive monitoring also helps identify issues before they affect the organization.

Learn how AVI-SPL's Enterprise Managed Services help develop frameworks and technology standards.



MAINTAIN VISIBILITY AND PERFORMANCE OVER TIME

Creating standards is one thing. Knowing whether those standards are working is another.

Over time, small issues can become harder to spot. What works well in one office may not work the same way in another. Visibility helps IT understand where the collaboration experience is performing well and where it needs attention.

What should you be monitoring?

- Technology availability across collaboration environments.
- Performance of meeting rooms and shared spaces.
- Usage and adoption trends across the organization.
- Recurring support and reliability issues.
- Patterns that may affect the user experience.
- Room utilization and energy efficiency metrics.

Monitoring helps IT understand how collaboration spaces are performing and identify issues before they affect the user experience.

The data can also reveal patterns that may otherwise go unnoticed, helping guide future improvements and technology investments.

Learn how AVI-SPL's Enterprise Managed Services help monitor performance, identify issues, and support collaboration technology throughout its lifecycle.

DESIGN FOR EVERY CLIENT INTERACTION

Every client interaction reflects your organization. Consistent collaboration experiences don’t happen by accident. They’re created through intentional planning, so employees and clients can focus on the conversation instead of the technology.



Finding the Right Partner

Creating and sustaining collaboration experiences often requires specialized expertise. The right partner can help align technology decisions with business goals and the needs of the people using them.

Connect with AVI-SPL to discuss your collaboration goals and technology priorities.

Explore Financial Services Collaboration Solutions

AVI-SPL is the leading global technology solutions provider, transforming how people and technology connect to drive better outcomes. We help organizations elevate experiences, create new value, and thrive in a rapidly evolving world. As the leading provider of communications, collaboration, and experience technology solutions, we partner with companies to design, deploy, and manage AV and UC solutions. Our team provides personalized guidance and consistent service delivery so our solutions drive results today and tomorrow.

Let's work together.

Contact AVI-SPL today.
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