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Japan System Techniques Co., Ltd.

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## **JAST Starts Sales of Cloud BankNeo Insurance Operations Support**

### **Shizuoka Bank announces decision to use this new product**

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Japan System Techniques Co., Ltd. (“JAST”) announced today the start of sales of Cloud BankNeo Insurance Operations Support, a financial product sales support system that uses the Salesforce Platform (a business application development platform), and the decision of The Shizuoka Bank, Ltd. (President: Minoru Yagi, Head office: Shizuoka) to use this new system. Cloud BankNeo Insurance Operations Support is one of JAST’s BankNeo data integration packages for financial institutions.

#### **■ Reason for Use by Shizuoka Bank**

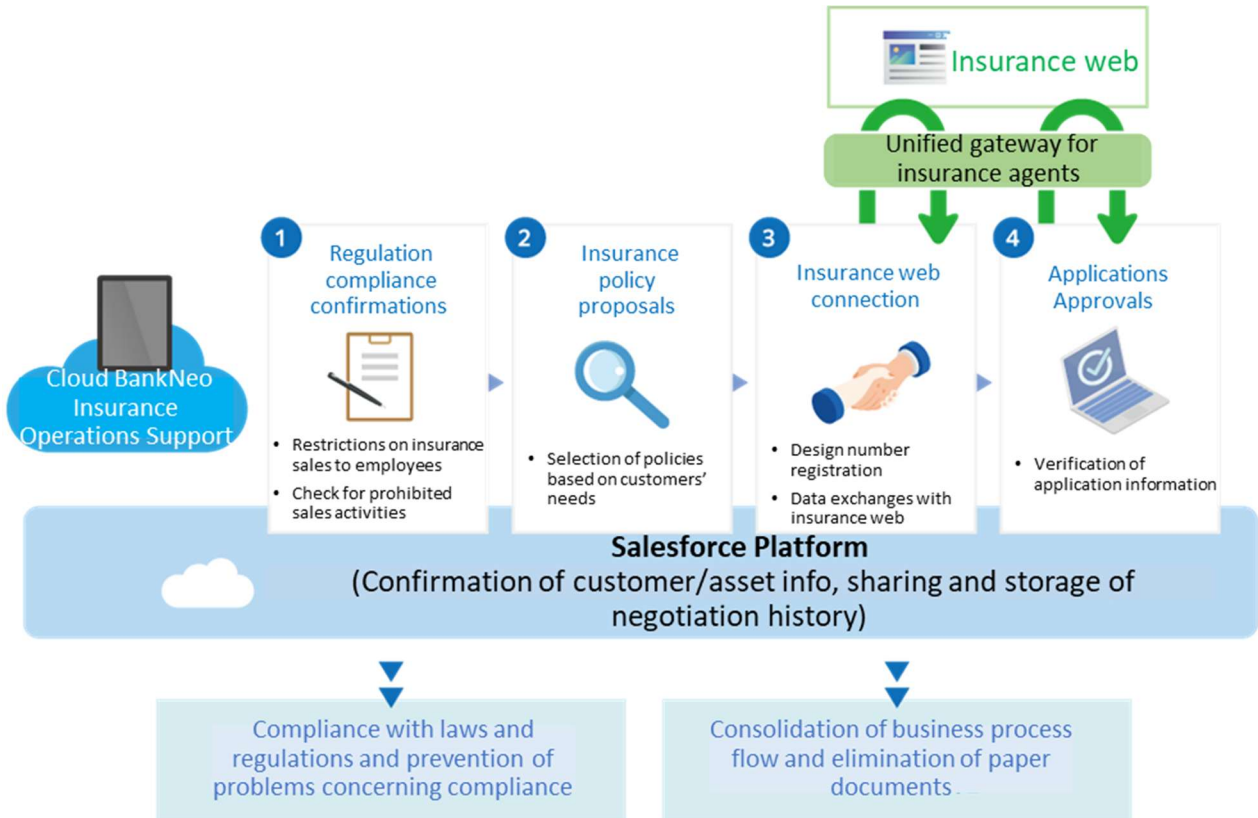
The Shizuoka Financial Group Inc., which includes Shizuoka Bank, is currently implementing its 1st Medium-term Business Plan that is called “Xover – Clearing the way to a new era.” As part of this plan’s transformation strategy, one goal is innovations involving conventional sales methods and business processes by using digital technologies and data. The objective is to provide customers with customized solutions that match their needs.

The JAST system will operate by using the same platform as the one currently used by Shizuoka Bank for its S-CRM sales support system. Using the new JAST system will facilitate an efficient and stress-free business process flow for the sales of insurance policies. The ability to meet Shizuoka Bank’s request for more rigorous compliance activities by using systems for checking regulations and other tasks is another reason that the bank selected Cloud BankNeo Insurance Operations Support.

■ **Functions of Cloud BankNeo Insurance Operations Support**

This system performs tasks involving the sale of insurance policies to customers by financial institutions. Capabilities extend from required compliance confirmations to links with the unified insurance company gateway for sales agents.

Structure of Cloud BankNeo Insurance Operations Support



■ **Expected Benefits**

Cloud BankNeo Insurance Operations Support can be used on the same Salesforce Platform used for the current sales support system (S-CRM). This makes it possible to perform every step from the selection of insurance policies to the determination of designs while sharing customer and sales activity information. Furthermore, for the first time in the insurance industry, this new system facilitates links with insurance web by accessing from Salesforce the unified insurance company gateway.

Providing the insurance operations support function as an AppExchange ensures outstanding compatibility with the Salesforce Platform while enabling easy and efficient checks of customer characteristics, regulations and other items. In addition, the new system is expected to reduce time needed for clerical tasks by providing one-stop convenience for all steps through the purchase of policies by customers.

■ **Remarks by Ichiro Kosugi of Life Planning Support Dept., Shizuoka Bank**

Shizuoka Bank wants to be the best place for consultations for customers as Japan looks ahead to the era the 100-year life. To accomplish this goal, we have a menu of services that can match the wishes of every customer. Using Cloud BankNeo Insurance Operations Support on the same platform as our S-CRM will allow us to use a goal-based approach based on each individual's future goals to provide customers with the most suitable insurance policies. This approach will make it possible to sell policies that closely match the life events of our customers while adhering to our policy of conducting business operations that originate with the needs of our customers.



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