

October 22, 2018

For General Release

Information Services International-Dentsu, Ltd.

ISiD Builds Portal Website on Salesforce Community Cloud for Opening Wrap Accounts at Shizuoka Bank

Using Digital Technologies to Support Customer Contact Reforms
and Enable Account Opening-Related Procedures to Be Completed Online

Information Services International-Dentsu, Ltd. (“ISiD” Head office: Minato-ku, Tokyo; President and CEO: Setsuo Kamai) announces that it has built a portal website for the opening of accounts (hereinafter, “the system”) on the Salesforce Community Cloud for the Shizugin Wrap (MSV LIFE) discretionary investment management service handled by The Shizuoka Bank Ltd. (Head Office: Shizuoka City, Shizuoka Prefecture; President: Hisashi Shibata).

This system is a portal website enabling the simple online completion of all procedures required for opening various accounts when using a wrap account, which the bank expects will become a new channel in line with the customer contact reforms it is promoting. This is the first time a Japanese bank has been provided with a portal website facilitating the entire application process for opening a wrap-related account online.

Background

Amid a decline in customer visits to banks due to the spread of IT services, many regional financial institutions are launching initiatives to optimize customer communications through the use of digital channels. Given these conditions, one of the basic strategies announced in the Shizuoka Bank Medium-term Business Plan involves revamping sales operations using channel and IT infrastructure. To this end, the bank is engaged in strengthening and expanding its non-face-to-face channels using the internet and other technologies. In addition, through a 2014 capital alliance and ongoing collaborations with the Monex Group, the bank is promoting initiatives aimed at expanding its customer base and acquiring new earning opportunities.

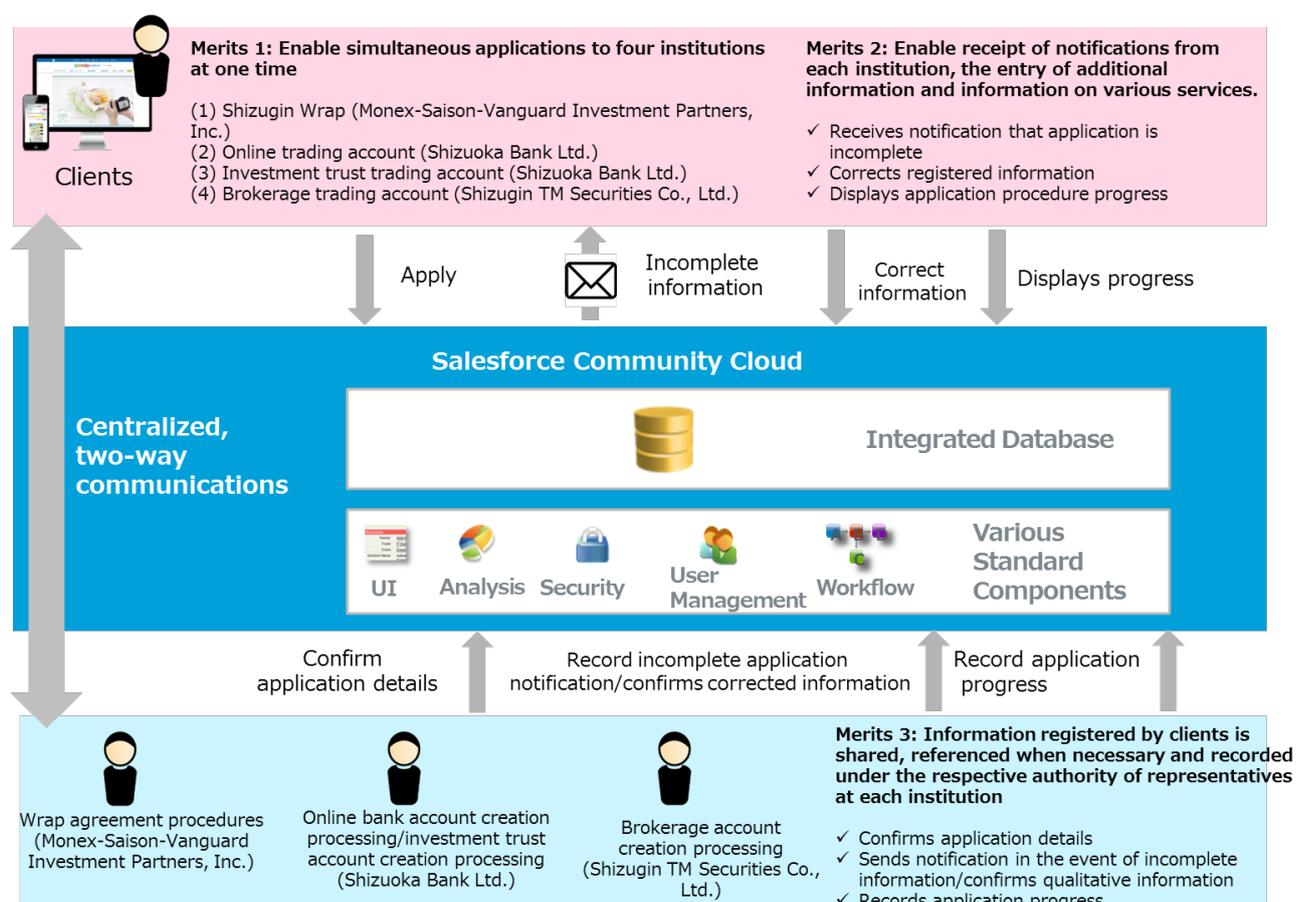
These efforts include Shizugin Wrap (MSV LIFE) handled by the bank since August 2018, with Shizuoka Bank as the intermediary in the agreement concluded on the MSV LIFE discretionary investment service operated by Monex-Saison-Vanguard Investment Partners, Inc. (Head Office: Minato-ku, Tokyo; Chairman and President: Tomoshige Nakamura). This service offers features not available with conventional wrap accounts, such as investments starting at 1,000 yen and low overall management costs, which the bank expect will appeal to a wide range of age groups. In launching these services, the Bank decided to use the Salesforce Community Cloud with the aim of establishing a new channel for the development of new clients and selected ISiD as its partner in creating this service.

For details regarding Shizugin Wrap (MSV LIFE), please visit:

https://www.shizuokabank.co.jp/personal/save/shizugin_wrap/index.html

System Overview

In general, to utilize a wrap account, clients must have multiple linked accounts, such as deposit and brokerage accounts. When opening a new account, application procedures are required for each account. These applications involve different institutions—deposit accounts are made at banks and brokerage accounts are made at brokerage firms, while wrap agreements are made with financial advisors—making the process complicated for clients, who must repeatedly enter the same information, visit certain offices and mail documents to others. The system built by ISID is a portal enabling the simple online completion of all these procedures. Not only can these account creation application procedures be completed all at once, users can also confirm the overall progress of their applications with each institution.



Shizugin Wrap Account Creation Portal System Overview

ISID's Role

In creating this system, ISID redesigned the operation flows of multiple vendors, including banks, brokerage firms and investment advisors, built a system using Salesforce Community Cloud and developed a user interface. Going forward, Shizuoka Bank will further expand their provision of information to clients using this system, which they plan to utilize as an integrated client communication platform.

As a certified partner of Salesforce.com Co., Ltd. (Japan Head Office: Chiyoda-ku, Tokyo; Chairman and President: Shinichi Koide), ISID has a wide range of accomplishments in creating large-scale B2B and B2C systems using the Salesforce Platform and introducing the Salesforce Sales Cloud platform to support client

sales. Specifically, in recent years we have enhanced our sales structure through the use of Salesforce solutions in the financial industry to support customer contact reform efforts at financial institutions.

About the Salesforce Community Cloud

The Salesforce Community Cloud is an engagement platform provided by Salesforce.com Co., Ltd., which seamlessly links customers with company representatives and partners and supports the formation of communities able to easily share information and provide feedback.

Note: Company and product names in this release are the trademark or registered trademark of each company respectively.

Contact:

ISID Corporate Communications Office

TEL:+81 3-6713-6100

E-mail : g-pr@isid.co.jp
