



Modernizing the Financial Services sector

Business led. Technology enabled.



Results from our 2022 KPMG U.S Technology survey show many organizations are turning to new and emerging technologies to strengthen customer loyalty, enhance their products and services, protect their market share, and win new business.

It may come as little surprise that **financial services - banking and insurance** companies spend more on technology as a percentage of annual budget than any other industry.



**Spend 10% or more
on technology**

70%

All financial services companies

57%

All companies

KPMG LLP (KPMG) helps financial services clients grow, connect with customers, manage costs, and comply with regulations by leveraging data, digitization and disruption.

KPMG and Microsoft offerings for financial services companies.

Cloud-enabled transformation

KPMG leverages our business-first mindset coupled with deep technical expertise and cutting-edge Microsoft Azure™ technology, including the Microsoft Cloud for Financial Services, to provide you with [cloud transformation](#) services across the entire cloud life cycle. We advise, collaborate and build trust to deliver a differentiated transformation experience. KPMG helps organizations to become cloud native so they can operate at the speed and scale of digital and unlock greater innovation and agility. Our business-led approach reignites the cloud journey.

Supply Chain transformation enabled by Microsoft Dynamics 365™

KPMG offers this pre-configured technology solution that integrates warehousing, purchasing, manufacturing and distribution. It is designed to help you create a modern, integrated supply solution with better practice processes and built-in inter-operability. Designed to connect customers to supply, it's driven by the insights you need to buy and make exactly what you need to help keep your customers satisfied. A pre-configured cloud solution, embedded with years of KPMG leading practice and enhanced with automation, [Powered Supply Chain](#) helps you to quickly transform and derive value from your move to the cloud.

Finance and operations transformation enabled by Microsoft

KPMG offers a pre-configured cloud solution that's embedded with years of leading practice and enhanced by automation. [KPMG Powered Finance enabled by Microsoft Dynamics 365](#) is the outcome-driven transformation solution that takes a pragmatic and tested approach to preparing your business for the future.

Cyber Security

KPMG understands that cyber risk can affect brand reputation, investor confidence, customer experience, product integrity and much more. Leveraging tools like the Microsoft Azure Cloud environment, Microsoft 365, and Microsoft Sentinel™, [KPMG cyber security](#) professionals help you to address your organization's legal and operational risks.

Tax reimaged enabled by Microsoft

Tax leaders today are faced with dramatic changes affecting all aspects of tax operations. From regulatory changes to shifting work models to technology disruption, tax leaders need to address these challenges to make their function more efficient, accurate, and future-ready.

KPMG and Microsoft combine advanced technologies, experienced tax professionals, industry insight and creative thinking to deliver measurable results, as defined by you. Regardless of the approach you select, we can help you position tax more strategically. That's the true value of [Tax Reimagined](#).

KPMG Learning as a Service enabled by Microsoft

New workforce models and technologies are rapidly changing the nature of work. Employees need to keep pace with new skills, knowledge and workforce capabilities. Organizations must balance changing employee expectations with business goals by offering increased connectivity, collaboration, and interaction. They need to offer customized and contextual content that matches the requirements of a more digitally enabled and geographically dispersed workforce.

[KPMG Learning as a Service \(LaaS\)](#) is a global, digital platform that integrates customized learning into the everyday flow of work. Built on Microsoft Azure, the platform brings together the knowledge, experience, learning design, and technology skills of KPMG professionals, plus the world-class technology and capabilities of Microsoft.

Marketing, Sales and Service enabled by Microsoft

As organizations seek to grow, it is increasingly imperative to become customer-centric and leverage the right technology in the right way in order to guide strategy, operations and investment decisions.

KPMG can help you accelerate your front office transformation. Leveraging Microsoft technology and KPMG accelerators, we allow customers to tap straight into advanced organizational design, leading technology, processes, and operating models.

Through [Powered Marketing, Sales and Service](#), KPMG shows customers the art of what's possible and works with them to achieve it.

Data and Artificial Intelligence

In a world inundated with data, companies are becoming proficient at collecting information, but most still struggle to convert data into actionable insight, and insight into tangible business value. Leading companies with mature Data and Artificial intelligence (D&AI) strategies are harnessing the power of data by accessing multiple internal and external data sources and breaking down silos within the organization as they do so. They are using sophisticated techniques to produce accurate insights and improve the quality and repeatability of the analytics solutions they implement. Now is the time to develop an actionable [D&AI strategy](#) and future state vision that deliver measurable benefits in cost reduction, revenue growth, and risk management. KPMG and Microsoft can help.

KPMG and Microsoft Strategic Global Alliance

A secure path to modern, digital enterprise

KPMG brings a decades-long, global alliance with Microsoft that includes a specialized practice for Financial Services companies. Our solutions allow organizations to better manage their risk, compliance and security agendas, create meaningful data insights to inform intelligent decision making, and take advantage of the latest innovative technologies to drive business value and growth.

Contact us

Denis Berry
Advisory Principal
KPMG in the U.S.
T: 312-665-2866
E: dberry@kpmg.com

Deb Cox
Alliance Director
KPMG in the U.S.
T: 214-840-2977
E: deborahcox@kpmg.com

kpmg.com/socialmedia



Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.

Microsoft, Microsoft Dynamics 365, Microsoft Azure, Microsoft Cloud for Financial Services and Microsoft Sentinel are trademarks of the Microsoft Corporation.

The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act upon such information without appropriate professional advice after a thorough examination of the particular situation.

The KPMG name and logo are trademarks used under license by the independent member firms of the KPMG global organization.

© 2023 KPMG LLP, a Delaware limited liability partnership and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.