

Financial services runs on trust and technology

In financial services, every interaction matters and so does the endpoint. Across the entire ecosystem, advisors need instant systems; analysts rely on stable, real-time data, and compliance teams need tools that work securely and consistently.

When technology slows down, the impact is immediate: missed opportunities, frustrated employees, and heightened risk. In a highly regulated industry, even minor disruptions can become major PR crises.

Frictionless IT: Why it matters in financial services

Financial services IT operates in a high-stakes environment:

- ✓ **Regulatory compliance** demands systems that are consistent, secure, and reliable.
- ✓ **Distributed teams and multiple endpoints** need technology that's fast, accurate, and trustworthy.
- ✓ Shifting from reactive responses to proactive prevention means **zero tolerance for downtime** and performance issues.
- ✓ Employees can **focus on delivering customer value**, not battling IT problems.



5 Steps to achieving frictionless IT with TeamViewer DEX

Infrastructure metrics and support tickets alone don't reveal the full picture of IT performance. System slowdowns and security friction often go unnoticed. To operate at scale, especially in hybrid and remote environments, IT cannot rely on reactive approaches alone. TeamViewer DEX focuses on employee experience and gives IT leaders the visibility they need to prevent disruption, protect compliance, and support productivity.

1 Shift from reactive to proactive IT to prevent disruption before it impacts the business

- Identify early signs of performance degradation
- Reduce repeat incidents and strengthen resilience in critical systems

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3 Balance productivity and compliance without slowing employees down

- Understand how policies and controls affect experience
- Reduce friction that drives risky workarounds
- Support regulatory confidence across roles and workflows

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2 Reduce digital friction to deliver consistent performance across endpoints and apps

- Monitor application stability and responsiveness across locations and devices
- Detect issues tied to device, app updates or configuration changes

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4 Optimize high-impact financial workflows to improve reliability

- Make critical processes like client onboarding, reporting, approvals, servicing faster and more reliable
- Reduce delays in standard regulatory workflows while protecting sensitive data

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5 Turn experience insights into IT strategy where IT decisions are aligned with business outcomes

- Prioritize improvements based on employee impact to support scalable and compliant growth
- Track experience data over time with unified endpoint visibility

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287% ROI

TeamViewer helps IT leaders in financial services elevate employee and customer experience through modern DEX. AI-powered visibility across endpoints and applications enables teams to identify and resolve friction before it impacts employees or clients. Proven results include a payback period of less than six months and an ROI of 287%, driven by productivity gains, cost savings and IT efficiency.

Frictionless IT starts with experience.

See exactly how software is used across your organization. DEX helps you cut unnecessary apps and reduce risk, cost, and audit exposure.

[Request a consultation](#)