

# Fusion for Financial Services

From customer services to complete compliance, Fusion connects the dots.

Technology has always been a catalyst that has pushed financial services professionals to the next big thing. Now, Lucidworks Fusion transforms your big data investment into unparalleled customer service, comprehensive access to data, and complete regulatory compliance across the organization.

## Banking Institutions

**Powerful enterprise search across silos and business units**

Banks today deal with a unique set of challenges as they navigate an ever-changing consumer landscape as well as business expectations. Search technology is at the forefront of making sense of this new world of finance.

The variety of data sources you have to juggle today has evolved beyond the traditional mix. Enterprise workers at financial institutions need access to data stored in the cloud, behind SaaS services, and other silos. Lucidworks Fusion scales to billions of documents no matter where they're stored or what format they're in. With over 50 pre-built connectors and adapters, Fusion connects to all of your data for real-time access regardless of where your data lives.

## Insurance and Risk Management

**Complete control and comprehensive compliance**

Insurers increasingly face a regulatory landscape while trying to mitigate game-changing trends like cyber-risk and disruptive innovation. Search can help these organizations stay nimble and maintain growth.

Lucidworks Fusion has the out-of-the-box capabilities to detect fraud and other anomalies across millions of log entries and documents. The platform's architecture scales both horizontally and vertically to give your firm complete secure access to all your data. Fusion ensures you can verify adherence to organizational and regulatory data retention and access policies.

## Investor Services and Wealth Management

**Customer 360 and Active Insights**

Generational trends are changing how wealth management and investment companies sell and support. Customers expect customized advice with a multi-channel approach. Search helps account managers see the full picture of each customer and offer the best possible advice.

Fusion can connect to data behind any source, matching CRM records with marketing activity, support tickets with purchase history, so everybody—sales, marketing, support—has a full 360 view of every customer. Wealth managers can see the full picture, guiding the customer on to upsell into more products and services.



## Top 3 US Bank

3rd largest bank in the US with 38M searches and 293k unique users. Deployed search apps built with Lucidworks Fusion and now only 0.14% of queries have zero results and employees rate their search as the most valuable feature of their intranet.



## Top 5 Global Investment Bank

A top five global investment bank built an app with Lucidworks Fusion that searched across 250M rows, each with 60-70 fields per document—and 50 million rows with 1000 fields per document—an entire two billion row collection. Fusion was 20x faster than competitors.



### Over 50 Connectors

Connect to a myriad of popular data sources including filesystems, databases, and the cloud or ingest data from proprietary systems with our connector framework.



### Natural Language Processing

Parse and process plain English queries so users don't have to learn complex operators or functions.



### Security from App to Document

Your security model enforced end-to-end across application, collection, document, and cell with redaction of sensitive information plugging right into your Kerberos, Active Directory, or other system.



### Relevancy Tuning

Point-and-click control over relevancy with simulated preview of how search results will be scored before committing them to production—and of course rules for boosts and blocks as well.



### Recommendations

Aggregate user behavior like queries, clicks, and views to give every user a customized search experience that is continuously fine-tuned with the actions and queries of similar users.



### Easily Scale

Effortlessly scale to millions of documents and users across thousands of nodes with hundreds of queries per second and bulletproof uptime.



### Event Correlation

Use machine learning to model and detect security threats and anomalies that could indicate fraud or other bad actors.



MOODY'S



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## Get Started or Learn More

For more information or to start using Fusion, contact us today at [lucidworks.com/contact](https://lucidworks.com/contact) or call 415-329-6515.