Dizzion + IBM Cloud for Financial Services
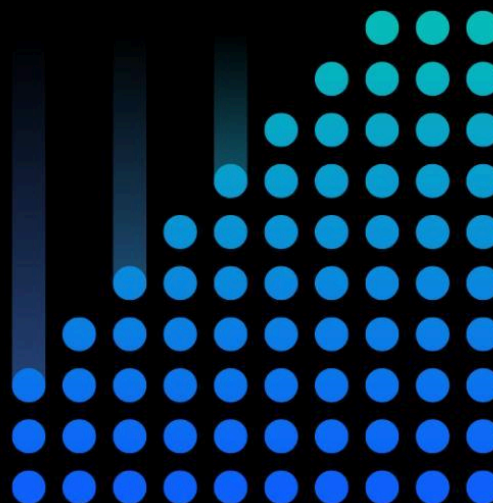
Partner Marketing Content Brief

IBM

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How to Use This Document

Background

This content brief provides a set of "plug and play" options for the Dizzion + IBM Cloud for Financial Services team to utilize as they create content to go to market together.

In our discovery process, we heard that the Dizzion team seeks to demonstrate that they understand the financial services industry's unique **Problems**. They also want to align their value proposition to the **Benefits** that Dizzion + IBM Cloud for Financial Services can bring to their target audience to solve these challenges. Additionally, aligning their message to **Use Cases** helps the target audience better understand their solution. You will see messages aligned and organized around these three angles below.

Using the Content Blocks

Based on the type of content you are creating, you will need to select anywhere from 1-3 options from each content block. The blocks required for each content type are as follows:

One-Pager:
- 1 Headline
- 1 Sub Headline Supporter
- 3 Metrics / Combined Benefits
- 1 Challenge & Solution
- 1-2 CTAs

Landing Page:
- 1 Headline
- 1-2 CTAs
- 1 Sub Headline Supporter
- 3 Metrics / Combined Benefits
- 1 Testimonial
- 1-3 Dizzion Solutions

For more information on the templates for these content types, see the Template Guide.

Assumptions

- The target audience is toward the top of the sales/marketing funnel with Dizzion + IBM Cloud for Financial Services.
- The messages need to be relevant across sections of financial services — healthcare, finance, insurance, legal, IT, and more.
- The target audience provides secure Managed Daas (desktop as a service) for businesses and commercial clients (B2B) in BPO, Healthcare, Financial Services, Insurance, Legal, and Education as well as employees, advisors, and customer experience managers (B2E).

Message Categories

Depending on your target audience and where they are in the funnel, you may want to focus your message differently on use cases, benefits, or problems. Each of the content blocks below offers options across these categories.

1. Use-Case Focused

This messaging category defines the use cases for Dizzion + IBM Cloud for Financial Services. Messaging should demonstrate how the product can be used to support our current business needs and drive our necessary outcomes.

Questions your audience might ask:

- I need a managed desktop. Is this product the best way to do it?
- How can Dizzion's product make my employees more efficient?
- How can Dizzion's product help me better serve my clients?

2. Benefit-Focused

This messaging category defines the high-level benefits of Dizzion + IBM Cloud for Financial Services. Messaging should demonstrate what benefits the audience gets from this partnership and its product.

Questions your audience might ask:

- Will I be able to build what my business unit needs quickly?
- Is this product going to fit within my budget?
- Will I be able to tailor this product to fit my team's and my business unit's specific needs?

3. Problem-Focused

This messaging category defines the problems that Dizzion + IBM Cloud for Financial Services helps to solve. Messaging should demonstrate an understanding of the problems facing the market, and how this partnership solves them.

Questions your audience might ask:

- This business will lose revenue and client trust if we spend a decade and billions of dollars undergoing digital transformation. How can this product help us?
- Our clients' needs and desires are ever-changing. How can we keep up with the different needs of this demographic?

- The economy can change and shift unexpectedly. How can my technology be easily adapted to these changes?

Content Blocks

Use each of the different types of content blocks to "plug and play" into your marketing content. The text in blue indicates what is different between each messaging category.

Headlines

The one-liner that answers "Why Dizzion + IBM? What can they do for me?" Choose one per content piece.

Benefit-Focused
- Dizzion + IBM Cloud for Financial Services Put Valuable Desktop Solutions in the Hands of Your Clients Faster.
- Solutions for All Sizes, Integrated Seamlessly with Dizzion + IBM Cloud for Financial Services.
- Dizzion + IBM Cloud for Financial Services is the Turnkey DaaS Solution You've Been Waiting For.
- Dizzion + IBM Cloud for Financial Services is Easy to Customize with More Choices Than Ever.
- Accelerate Your Time-To-Market with the Dizzion + IBM Cloud for Financial Services Managed DaaS Solution.
- Big Solutions for Tight Wallets - Dizzion and IBM Cloud for Financial Services are a Match Made in Financial Services Heaven.
- Dizzion + IBM Cloud for Financial Services: The Ultimate DaaS Dream Team-Take Remote Working To The Next Level.

Use Case-Focused
- Unlock the true ROI of DAAS with Dizzion + IBM Cloud for Financial Services.
- Experience Optimal Desktop Compliance with Dizzion + IBM Cloud for Financial Services. Period.

- Accelerate Your Speed to Compliance with Dizzion + IBM Cloud for Financial Services.
- Enjoy Rapid Scalability with Cutting-Edge Security with Dizzion + IBM Cloud for Financial Services.
- Dizzion + IBM Cloud for Financial Services Global Delivery Means You Work Safe, Smart, and Secure from Anywhere.

Problem-Focused
- Dizzion and IBM Cloud for Financial Solutions Don't Make You Choose Between Security and Productivity.
- Dizzion and IBM Cloud for Financial Solutions Don't Make You Choose Between Security and Employee Happiness.
- With Dizzion and IBM Cloud for Financial Solutions Downtime Is No Longer A Problem.
- Keep Pace with the Evolution of Your Users with Dizzion + IBM Cloud for Financial Services.

Sub Headline Supporters

These few sentences support your headline and explain at a high level what Dizzion's and IBM Cloud for Financial Services' partnership offers your target audience. Choose 1 based on how you want to tailor your message.

Problem-Focused
- The digital transformation of the financial services industry needs to keep up with the demands of the market. Expedite your efforts with Dizzion's scalable platform and a security-rich public cloud designed for regulated industries like financial services. Through our partnership, your users can securely work anywhere — with agility and mobility from the hybrid, multi-cloud integration of IBM Cloud for Financial Services.

  Dizzion's partnership with IBM Cloud for Financial Services offers Managed DaaS on the IBM Cloud where you can build secure, long-term remote environments that optimize end-user performance and provide industry-leading security and compliance.

- Your business needs to keep up with the demands and needs of your employees while meeting security and compliance requirements. Accelerate your efforts with Dizzion's scalable platform and a security-rich public cloud designed for regulated industries like financial services. Through our partnership, your users can securely work anywhere — with the high performance and compliance from the hybrid, multi-cloud integration of IBM Cloud for Financial Services.

  Dizzion's partnership with IBM Cloud for Financial Services offers Managed DaaS on the IBM Cloud where you can build secure, long-term remote environments that optimize end-user performance and provide industry-leading security and compliance.

Use Case-Focused
- Accelerate your digital transformation with Dizzion's tailored platform and a security-rich public cloud designed for regulated industries like financial services. Through our partnership, get real-time data for trend analysis and informed decisions — with agility and mobility from the hybrid, multi-cloud integration of IBM Cloud for Financial Services.

  Dizzion's partnership with IBM Cloud for Financial Services offers Managed DaaS on the IBM Cloud where you can build agile, long-term remote environments that optimize end-user performance and provide industry-leading security and compliance.

- Accelerate your digital transformation with Dizzion's tailored platform and security-rich public cloud designed for regulated industries like financial services. Through our partnership, you can optimize business operations — with agility and mobility from the hybrid, multi-cloud integration of IBM Cloud for Financial Services.

  Dizzion's partnership with IBM Cloud for Financial Services offers Managed DaaS on the IBM Cloud where you can create customized, efficient desktop experiences that optimize end-user performance and simplify workforce management.

- Accelerate your digital transformation with Dizzion's tailored platform and a security-rich public cloud designed for regulated industries like financial services. Through our partnership, turnkey remote work is a reality — with agility and mobility from the hybrid, multi-cloud integration of IBM Cloud for Financial Services.

  Dizzion's partnership with IBM Cloud for Financial Services offers Managed DaaS on the IBM Cloud where you can build agile, long-term remote environments that optimize end-user performance and provide industry-leading security and compliance.

Benefit-Focused
- Accelerate your digital transformation with Dizzion's Managed DaaS platform and a security-rich public cloud designed for regulated industries like financial services. Through our partnership, you can respond faster and more effectively to industry change — with agility and mobility from the hybrid, multi-cloud integration of IBM Cloud for Financial Services.

  Dizzion's partnership with IBM Cloud for Financial Services offers Managed DaaS on the IBM Cloud where you can build agile, long-term remote environments that optimize end-user performance and provide industry-leading security and compliance.

- Expedite your digital transformation with Dizzion's Managed DaaS platform and a security-rich public cloud designed for regulated industries like financial services. Through our partnership, you can get remote work solutions to market faster — with agility and mobility from the hybrid, multi-cloud integration of IBM Cloud for Financial Services.

  Dizzion's partnership with IBM Cloud for Financial Services offers Managed DaaS on the IBM Cloud where you can build agile, long-term remote environments that optimize end-user performance and provide industry-leading security and compliance.

- Turn the desktop into your most powerful tool with Dizzion's Managed DaaS platform and a security-rich public cloud designed for regulated industries like financial services. Through our partnership, your IT teams can focus on delivering business value — with high performance and reliability from the hybrid, multi-cloud integration of IBM Cloud for Financial Services.

  Dizzion's partnership with IBM Cloud for Financial Services offers Managed DaaS on the IBM Cloud where you can build high-performance, long-term remote environments. You can focus on growing the business and stop worrying about keeping the lights on.

- Accelerate your digital transformation with Dizzion's Managed DaaS platform and a security-rich public cloud designed for regulated industries like financial services. Through our partnership, you can increase user productivity and employee happiness — with agility and mobility from the hybrid, multi-cloud integration of IBM Cloud for Financial Services.

  Dizzion's partnership with IBM Cloud for Financial Services offers Managed DaaS on the IBM Cloud offers simplified, robust desktops that optimize end-user performance and provide industry-leading security and compliance.

Combined Benefits and Metrics

The Combined Benefits and Metrics help your target audience understand the Dizzion + IBM Cloud for Financial Services partnership and how they benefit from investing in the partnered product. These benefits are ideally quantitative. Choose 2 benefits from Dizzion and 1 benefit from IBM Cloud for Financial Services.

Dizzion Benefits:
- Performance: A decade of continuous, customer-centric improvement has led a Managed Desktop as a Service platform that outperforms the rest.
- Protection: Managed desktop compliance, layered enterprise security, and platform resilience.

- Flexibility: Focused as an End-User Cloud Platform which includes AnyCloud global delivery, infrastructure flexibility, seamless integration, COSMOS orchestration & analytics.
- Turnkey Managed Desktop as a Service: Get more services and the white-glove treatment from the best in the business. Dizzion has been Desktop as a Service before it was common, providing cloud desktop innovation and excellence since 2011. The Dizzion team is your team.
- Easy to Use: We handle 90% of the controls for you.
- Compliant Cloud Desktops: We are HIPAA, PCI-DSS, GDPR, SOC 2 Type II compliant.

IBM Cloud for Financial Services Benefits
- Address Your Compliance Needs: Benefit from services with automated, pre-configured controls.
- Speed Innovation: Access an ecosystem of ISVs, fintechs, and SaaS providers.
- Safeguard Your Data: Get data control with industry-leading security capabilities.
- Operate with Agility Anywhere: Build and deploy anywhere through hybrid cloud deployment options.

Shared Benefits:
- Global Reach: Global reach, custom solutions — in the hands of users around the world, faster.
- Speed to Market: Get to market faster with exactly what your market needs.
- Enhance UX: We help our clients transform their clients' user experiences.

Challenge & Solution

This section clearly states the kinds of challenges your target audience faces and how your solutions — and the partnership with IBM Cloud for Financial Services — solves these problems.

The Challenge: The massive adoption of DaaS recently has revealed the cracks and problems around realistic scaling, cost complexity to the cloud, and other digital transformation challenges.

The Solution: Dizzion was the first to tackle voice and desktop portals over a decade ago. The platform capabilities enable scale and simplicity long-term as your organization changes and grows. And with IBM Cloud for Financial Services, your technology will be held to the highest standards of security and compliance, all while improving outcomes for your business and your users.

The IBM Partner Advantage: IBM Cloud for Financial Services is a first-of-its-kind public cloud developed for the financial services industry with the security and controls capabilities to help clients as they work to mitigate risk and accelerate cloud adoption for even their most sensitive workloads.

The cloud is designed to help clients automate their security and compliance posture and monitor it with security and controls built into the platform — not just offered as add-on tools or do-it-yourself features.

It also features industry-leading security and privacy capabilities and is strengthened by IBM's deep IT operations, industry expertise, and an extensive set of curated ecosystem partners (1).

Only ISVs and SaaS providers like Portworx that demonstrate compliance with the Framework and its comprehensive set of policies and controls are eligible to deliver offerings with the Financial Services Validated designation.

The result is a secured environment engineered to help clients lower the risk and cost of moving sensitive data to the cloud, modernizing workloads and rapidly integrating the capabilities needed to move their business forward.

The Challenge: In this newly normalized hybrid/remote work landscape emphasis is placed on digital user experience and product performance to prevent technical downtime and decrease productivity in a digital environment.

The Solution: Dizzion's platform contains expert-crafted, thoughtful features speaking directly to pain points associated with working in online environments with unique requirements. And with IBM Cloud for Financial Services, you can create flexible, secure, and compliant solutions for today, tomorrow, and beyond.

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The Challenge: Working remotely is a challenge. It's made even harder with low-performing applications, growing IT tickets, and expanding compliance and security needs.

The Solution: Take the headache out of working remotely with Dizzion's Managed DaaS solution. With Dizzion, your users can access data and applications from a secure, high-performing desktop anywhere, anytime, from any device. And with IBM Cloud for Financial Services, you can rest easy knowing your employees are operating on the most secure cloud with optimal desktop security and continuous compliance.

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The Challenge: Finding the right DaaS solution for your company can feel like climbing your very own Everest. Demo after demo can feel daunting. And get confusing.
The Solution: We get it. The truth is that the right person can make any demo feel dazzling. At Dizzion we love to show you demos. But what we love more is creating a custom roadmap for your specific company to achieve success. With Dizzion's Managed DaaS solution, when you win, we all win. And with the Dizzion Managed DaaS

on the IBM Cloud for Financial Services, we are confident that we can create a secure, compliant remote environment that your employees will love, your IT team will thank you for, and your risk advisor will praise you for.

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The Challenge: Working remotely is a challenge. It's made even harder with low-performing applications, growing IT tickets, and expanding compliance and security needs. Not to mention, end user satisfaction. If the environment isn't easy and enjoyable to use, you're going to see productivity take a huge hit.

The Solution: Take the headache out of working remotely with Dizzion's Managed DaaS solution. With Dizzion, your users can access data and applications from a secure, high-performing desktop anywhere, anytime, from any device. Additionally,

environments can be customized to your specific business needs and to your individual user needs. That means more user satisfaction and higher productivity.

And with IBM Cloud for Financial Services, you can rest easy knowing your employees are operating on the most secure cloud with optimal desktop security and continuous compliance.

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Testimonials

Testimonials offer social proof — ideally from a joint customer of both Dizzion and IBM Cloud for Financial Services. Choose 1 based on how you want to tailor your message.

Dizzion Solution

This section provides one-liners specific to Dizzion's solution for financial services. Choose 1-3 to craft copy needed for the Landing Page and One Pager.

Problem-Focused:

- We offer independently audited and verified PCI-compliant virtual desktops, as well as secure endpoint solutions to meet a variety of needs within the highly regulated financial services industry.
- We cover key areas of concern for financial service organizations, making it easy to implement and control security and compliance at the end-user, and endpoint levels.
- Our fully managed desktop-as-a-service (DaaS) solutions allow end users to access data and applications from a secure, high-performing virtual desktop anywhere, anytime, from any device.

Benefit-Focused:

- Our heightened desktop security lets you utilize more than 100 user-level controls to limit how data is accessed, transmitted, and stored easily. Rest easy knowing your employees and contractors are working securely and compliant at all times.
- Our virtual desktops offer the same experience and level of security regardless of the user's device. Financial services organizations can support bring-your-own-device (BYOD) initiatives and employee mobility without compromising security and compliance standards.
- Our reliable configured desktops with the support of the IBM Cloud allow your employees to work from anywhere, on any device. Happy employees, happy business.
- The Dizzion + IBM Cloud Managed DaaS provides a secure, high-performance remote environment to free up your IT team to tackle needs that will really move the needle for your business.
- Our security, high-performance platform on the IBM Cloud ensures your employees always have access to mission-critical applications when they need it.

Use Case-Focused:

- Dizzion and IBM Cloud make new hire onboarding secure and simple with our secure desktops configured to your specific business-critical applications. Say goodbye to complicated provisioning and IT management processes.
- Our Managed DaaS solution supports legacy applications so your employees can access necessary applications, regardless of device or OS version, while maintaining security and compliance.
- Reduce the time and energy that goes into obtaining compliance independently. Dizzion's PCI compliance certification eliminates the drain on resources and simplifies the audit process.

CTAs

Calls to action help your target audience take action based on the message you shared. Choose 1 based on how you want to tailor your message.

Problem-Focused

- Don't waste another dollar on slow-moving digital transformation. Contact Sales.
- Talk to sales to learn how we can help solve your challenges.
- Don't waste another dollar on sluggish digital transformation. Give our sales team a shout and let's turbocharge your progress.
- A demo is one thing, but how will you scale it? Our experts won't take a step further until we know it's the right solution for you. Reach out today.

Benefit-Focused

- Start building solutions that can flex with your business, your users, and your needs.
- Experience top-notch performance and reliability. Request a demo.
- Work from anywhere, on any device, securely. Call today.
- Help your team work more happily and securely today. Contact the Dizzion team now.

Use-Case Focused

- Chat with our sales team to see how our Managed Daas solution can give your business a boost.
- Remote work not working as you imagined it? Contact our sales team to see how we can help.
- Let's build a remote desktop solution that bends and flexes with your business needs.

Supporting Market Data

These data points help your target audience know that Dizzion + IBM Cloud for Financial Services understand their challenges and their needs. Choose 1-2 based on how you want to tailor your message.

Remote work has been an overwhelming success for both employees and employers. The shift in positive attitudes toward remote work is evident: 83% of employers now say the shift to remote work has been successful for their company, compared to 73% in our June 2020 survey. Source: pwc

The office is here to stay, but its role is set to change. Less than one in five executives say they want to return to the office as it was pre-pandemic. The rest are grappling with how widely to extend remote work options, with just 13% of executives prepared to let go of the office for good. Meanwhile, 87% of employees say the office is important for collaborating with team members and building relationships — their top-rated needs for the office. Source: pwc

Employees want to return to the office more slowly than employers expect. By July 2021, 75% of executives anticipate that at least half of office employees will be working in the office. In comparison, 61% of employees expect to spend half their time in the office by July. Source: pwc

There's no consensus on the optimal balance of work days at home vs. in the office. Over half of employees (55%) would prefer to be remote at least three days a week once pandemic concerns recede — little changed from the 59% who said the same in June. For their part, while most executives expect options for remote work, they are

also worried about the effects: 68% say a typical employee should be in the office at least three days a week to maintain a distinct company culture. Source: pwc

55% of companies said 60% to 100% of their employees will work remote at least part time for the foreseeable future. Source: pwc

Desktop as a service (DaaS) market spending grew by 22% in 2022 compared with 2021 and is forecast to grow by 19% in 2023 as I&O leaders continue to adopt DaaS to enable remote work. Source: Gartner

The DaaS market has developed into three segments: self-assembled, vendor-assembled and vendor-managed. Source: Gartner

Cloud-native platforms are one of the 2022 Gartner top ten strategic technology trends,
indicating a shift from acceptable practice to preferred practice for many companies. But the needs of different market verticals are not always equal, so multiple CSPs have gone to market with industry-specific cloud offerings, with banks being one of the key markets they are targeting. This is still a new concept in the collective consciousness (as reflected in the Hype Cycle for Cloud Computing, 2021), but Gartner believes that its longer-term impact will be profound and widespread. Source: Gartner

By 2024, 80% of virtual desktops served to remote users will be DaaS, up from fewer than 30% today. Source: Gartner

The DaaS market is forecast to continue growing by 253% between 2021 and 2024. This follows a 98% increase in spending from 2019 to 2020, largely driven by the rapid move to remote work caused by the pandemic. There are still fewer DaaS users than those of on-premises VDI, but our forecasts suggest that DaaS usage will overtake VDI by 2024. Unless there is significant market disruption, DaaS will account for approximately 10% of total enterprise PC users by 2024.

While VDI is set to decline with −1.4% 2021-through-2023 compound annual growth rate (CAGR), there is not a significant shift from VDI to DaaS. DaaS is being adopted by

new desktop virtualization use cases, either customers new to desktop virtualization or new users within existing desktop virtualization customers. For traditional VDI clients, DaaS is most compelling at the point of technical refresh or license renewal. We anticipate that many existing VDI environments will be replaced with DaaS as they come due for technical refresh. Source: Gartner

VMware announced Dizzion was its preferred partner for DaaS on IBM Cloud in April 2021. See Dizzion Desktop as a Service Brings Advanced VMware Horizon Capabilities to IBM Cloud, VMware. Source: Gartner

- *"In fact, Dizzion DaaS on IBM Cloud offers so much value, and is such an easy migration for existing Horizon Cloud on IBM Cloud customers, that we've decided to make it our preferred platform for customers that want to place desktop virtualization resources on IBM Cloud. Therefore, we're encouraging all Horizon Cloud on IBM Cloud customers to migrate to Dizzion DaaS on IBM Cloud." - Gabe Knuth, EUC Product Marketing team VMware*

Resources and contacts

Citation for "The IBM Partner Advantage" Section:

1. Based on IBM Hyper Protect Crypto Service, the only cloud service in the industry built on FIPS 140-2 Level 4-certified hardware. FIPS 140-2 Security Level 4 provides the highest level of commercial security defined in this standard. At this security level, the physical security mechanisms provide a comprehensive envelope of protection around the cryptographic module with the intent of detecting and responding to all unauthorized attempts at physical access.

Main website
ibm.com/cloud/financial-services
Overview, benefits, case studies, news and blogs

White papers
Overview of IBM Cloud for Financial Services

Accelerate innovation through security and compliance with IBM Cloud for Financial Services

Sales kits on Seismic*
IBM Cloud for Financial Services

IBM Cloud Security and Compliance Center

Co-marketing resources
Overview for Demand Generation Co-Marketing

IBM Partner Plus_Identity_System_March2023 (use of logos)* For eligible membership levels

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Thank You