



City National Teams Up with Microsoft to Innovate High-Net-Worth Bill Pay and Cloud Accounting

Situational Overview

Increase the pace of innovation

City National's collaboration with Microsoft is a direct outcome of our longtime commitment to providing innovative business solutions to high-profile clients such as business managers, family offices and sports management firms.

In late 2019, Executive Vice President for Treasury Management Solutions Verna Grayce Chao recognized the need to increase the pace of change and innovation with a new secure bill pay and cloud accounting solution — AgilLink by Datafaction. Collaborating with the technology organization, she and her team set about finding the best way to do it.

Client Needs

Consolidating software and modernizing our client base

“We knew that clients needed added security, broader resiliency, automatic upgrades and greater scalability,” said Datafaction's head of product, Asher Adler. “However, we still had clients relying on our 40-year-old legacy software, a precursor to the web-based AgilLink.”

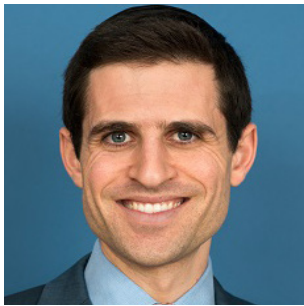
While groundbreaking in its day, the legacy solution was no longer the best approach for responding to high-net-worth clients' fast-paced, complex needs. Clients on Datafaction's on-premise legacy software need to provide their hardware, ensure that backups and disaster recovery are provided for and manage cybersecurity threats.

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— Asher Adler,
Datafaction

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— Verna Grayce Chao, City National Bank



Asher Adler
Datafaction
Head of Product

Datafaction manages all these aspects on Microsoft Azure’s hosting service with AgilLink software as a service (SaaS). The software can be accessed remotely from a browser and firms no longer need to worry about hardware, data backups and system availability.

By transitioning AgilLink from City National’s data center to Microsoft, Datafaction has taken advantage of a host of benefits from the platform as a service (PaaS) that allow for increased functionality while reducing down time.



Verna Grayce Chao
City National Bank
Executive Vice President
Treasury Management
Solutions

“For our largest clients to be able to adopt AgilLink, they need to know that the software is scalable, secure and available,” said Datafaction’s software development manager, Ami Adler. “Microsoft Azure PaaS infrastructure provides us a host of development tools that enables us to build, test and deploy new capabilities quicker and more cost-effectively.”

City National’s Approach

Moving to the next generation of cloud architecture

The legacy solution involved software installation on the client’s on-site servers, requiring maintenance, upgrading and replacement. At best, upgrades can result in downtime and loss of productivity. At worst, a server can fail, causing potentially catastrophic data losses. In-office servers meant that clients scrambled for limited office access during disasters.

Back in 2019, the City National team knew that moving AgilLink from City National’s data centers to Microsoft Azure offered seamless delivery of upgrades and the ability to continue business under any circumstances without missing a beat. At the time, City National was in the middle of digital transformation and moving to a “cloud first” strategy. The decision was to utilize Microsoft Azure as AgilLink’s new cloud platform, given City National’s already strong relationships with Microsoft.

“AgilLink is one of City National’s premium business management solutions,” said Chao. “We decided to lead the way with the next generation of cloud-based automation that would allow us to serve our clients better. We can now increase the rate of innovation to allow our clients to better meet their rapidly changing business needs on AgilLink.”

The team leading the technical execution applied their expertise to every part of AgilLink, including web, database, API layer, caching and scheduled tasks to identify the best Microsoft Azure service for each need. The team knew they needed to create a truly exceptional client service experience that would open up lots of valuable opportunities—both now and in the future.

“It was important to create a foundation for growth and innovation, and Microsoft’s Platform as a Service was the answer to that challenge,” said Chao. “Microsoft Azure offered a robust platform that would let us deliver the performance and experience our clients expect and deserve.”

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— Ninad Deshmukh, City National Bank



Ninad Deshmukh
City National Bank
Senior Vice President of
Development Services

Industry-Leading Benefits

Meeting clients' growing needs for tech-enabled banking

Added Security— Security and business controls are paramount to our clients. Safeguarding information permeates everything we do with AgilLink, from user-level, role-based permissions and audit trails backed by information security risk protocols to data security and privacy.

Built-In Resiliency— Datafaction's AgilLink clients eliminate server maintenance overhead, repair and replacement. Distributed server workloads prevent slowdowns or interruptions in client service, and automatic backups and disaster recovery help provide peace of mind. Businesses can operate remotely from anywhere at all times.

Scalability on Demand— No additional investments are needed when it is time to expand. Companies can take on new business without having to worry about buying new hardware or adding head count.

Faster Innovation— AgilLink rapidly delivers functions and features with even greater attentiveness to client requirements.

“As developers, we can respond more quickly to client needs that arise. We can also innovate, evaluate results and make adjustments in a much more agile way,” said City National Senior Vice President of Development Services Ninad Deshmukh.

“This is a great step forward in our cloud strategy. Continuing to build the robust, scalable and customized technology solutions that help our clients compete effectively is a top priority at City National Bank.”

— Rick Hariman, City National Bank



Rick Hariman
City National Bank
Chief Information Officer

Conclusion

Platform as a Service— Next Generation Cloud

“We are at the forefront of innovative, tech-enabled banking because this is what our clients want and expect from us,” said Chao. “With the Azure migration, our team of business and IT colleagues worked closely with Microsoft every step of the way to deliver a superior product tailored to our needs.”

Developing industry-leading tools and technologies is a foundational commitment at City National— dating back to the day we opened our doors.

“Our collaboration with Microsoft was key to the AgilLink Azure success,” said City National Bank Chief Information Officer Rick Hariman. “This is a great step forward in our cloud strategy. Continuing to build the robust, scalable and customized technology solutions that help our clients compete effectively is a top priority at City National Bank.”

Call **(323) 291-5700** or visit **Datafaction.com** to sign up for AgilLink. Find out more about City National Bank on **cnb.com**, **Twitter**, **Facebook** and **LinkedIn**.



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