



Supporting device needs for Financial Services

Microsoft Surface for Business offers a versatile device portfolio and are designed to be the optimal experience for both Windows 11 and Microsoft 365 to empower financial services professionals to work from anywhere while delivering more personalized and differentiated customer experiences.



Modern device strategy for Financial Services in a hybrid work world

The pandemic accelerated digital adoption. The most visible change is the shift to hybrid work. Financial Services firms raced to enable digital tools such as Microsoft Teams to empower employees to work from home, the office, and anywhere in between. Their customers have also become more digitally sophisticated, wanting more personalization and consistent experiences across channels. This creates new requirements for in-person, mobile, and virtual client interactions. This shift is encouraging some companies to update their hardware to support hybrid work, increase employee productivity, enhance collaboration, and provide greater flexibility for meeting various working styles. These benefits promote greater business success.¹

[Direct Line](#) is one of the UK's largest insurance companies. When the pandemic struck, the business had to quickly decide how it could continue to support its customers and ensure there was no disruption to service or claims work – despite the disruption of lockdown. Luckily, Direct Line was already exploring how to support its staff of 10,000 employees with flexible working practices, so it was able to quickly accelerate its existing best practices, which leveraged Surface Go 2 devices and Microsoft 365 tools, including Microsoft Teams.

Like Direct Line, many organizations have combined a cloud strategy with a modern device strategy to take advantage of the synergies between Microsoft 365 and Surface, often realizing

additional benefits including lower total cost of ownership, inclusive of direct savings, IT staff time savings, and employee productivity gains.² Light, mobile, and powerful, Surface devices deliver value and a premium experience that fits the needs of all personas in financial services, from branch workers, mortgage lenders, and wealth advisors to investment analysts and executives and their staff.

“ I love the Microsoft Surface Go 2. I love the fact that it's small and it's light and I can unplug it and take it into the office with me or I can unplug it and sit on my sofa on a video call. ”

- *Michelle Barnett, Service Relationship Manager, [Direct Line](#)*



Surface Pro 9 Graphite with Black Surface Pro Signature Keyboard and Surface Slim Pen 2.

¹ ["Understanding The Role Of Modernized PCs In Hybrid Work Environment Optimization"](#), a commissioned study conducted by Forrester Consulting on behalf of Microsoft, July 2021

² ["Evaluating the Business Case of Microsoft Surface"](#), a commissioned business value white paper by IDC on behalf of Microsoft, September 2022

The Surface family continues a tradition of Microsoft innovation

Microsoft Surface devices set the standard for premium devices in the PC industry. Elevating product craftsmanship with beautiful designs and high-end components, Microsoft is also raising the bar on security with a chip-to-cloud security solution and seamless device management down to the firmware.

This leadership is built on a long history of Microsoft innovation in the technology industry. From the beginning, Microsoft created Surface to be the device where the best of Microsoft comes together, powered by Windows. Microsoft's end-to-end, integrated portfolio of cloud solutions—Microsoft 365, Dynamics 365, and Azure, along with Microsoft Power Platform—is built on a foundation of security and privacy and helps organizations in every industry build resilience and improve the bottom line.

Innovative technology also engages and inspires employees, which enables financial services firms to provide employees with versatile devices and tools that closely align with the way they want to work in a hybrid work environment.

Portfolio diversity

Microsoft has been creating new categories of hardware to support hybrid work everywhere. For example, lightweight 2-in-1 devices feature tablet-to-laptop flexibility, combining the power of a laptop with the portability and touch interactions of a tablet. Microsoft also innovates on traditional design such as laptops with fixed or detachable keyboards that offer the power required for demanding applications and beautiful graphics with the flexibility to bring the device home and interact with customers while on the go.

Hardware and peripherals

People can meet face-to-face through 1080p video using PixelSense high resolution displays, Omnisonic speakers, and far-field mics that bring them together in realistic real-time detail, for more personal-feeling interactions and stronger collaboration. Beyond the keyboard and mouse, features such as touch, voice, LTE and 5G connectivity, and Surface Pen* ink inspire natural interactions. Expanding beyond the PC to large-screen devices, the Surface Hub 3 is a Microsoft Teams-certified meetings platform that can transform any space into a team space and interactive whiteboard.

2-in-1 devices



Pro 9
The most powerful Surface 2-in-1



Go 4
The lightest Surface 2-in-1

Laptops

Laptop Studio 2
Our most powerful laptop



Laptop 5
The perfect everyday laptop



Laptop Go 3
An exceptional value laptop

Desktops

Studio 2+
All-in-one computer with strikingly large 28" display and touchscreen



Large screen meeting devices



Hub 3 50" or 85"
Digital whiteboard, Microsoft Teams-certified meetings platform, and collaborative computing device.

* Sold separately.

Delivering more personalized and differentiated customer experiences

Retail bank employees



Customer service is priority one

Retail banks must illustrate the value of in-branch experiences. Retail bank branch associates and mortgage lenders require mobile, lightweight, and connected devices that give them access to the information they need to better serve customers by identifying preferences and answering questions as quickly as possible.

Providing a differentiated customer experience isn't easy when retail bank associates struggle to:

- Quickly find customer account information or bank product information
- Clearly communicate new financial services and promotions
- Represent the bank's premium brand and experience
- Keep sensitive client data secure

Surface helps retail bank employees:

- Carry a device around all day via a lightweight design and extended battery life.
- Make a great first impression with a premium device.
- Feel empowered with form factors—tablet, laptop, studio—that adapt to the ways they need to work.
- Run full-featured desktop and mobile apps using powerful processors and Windows OS to look up information and quickly respond to customers.
- Enable customers to interact with bank forms, product demos, promotion videos, and surveys on a high-definition PixelSense™ touchscreen.
- Go paperless and collect digital signatures on the spot using the Surface Pen.*
- Sign in instantly using an NFC badge, facial recognition, a secure PIN, or MFA through Windows Hello.
- Do more with Designed for Surface® accessories* such as durable cases and bank floor kiosk stands.
- Connect with associates at corporate or other bank locations with quality speakers, mics, and cameras and Microsoft Teams.*
- Deliver enterprise-grade protection for sensitive data.

* Sold separately.

For retail bank associates, we recommend:

Branch floor productivity



Choose **Surface Go 4**

Laptop-to-tablet flexibility that goes anywhere

Ideal for retail bank associates who need a mobile, lightweight device powerful enough to run the apps they rely on while interacting with customers on the branch floor. Our lightest Surface starts at just 1.15 lb.¹ with a compact tablet-on-the-go design, HD 10.5" PixelSense™ touchscreen display, and all-day battery² life. Able to handle everything from mobile apps to comprehensive full feature desktop software. Optional LTE Advanced connectivity³ available with the Surface Go 3 LTE model.

[Learn More >](#)

Need a more powerful device?

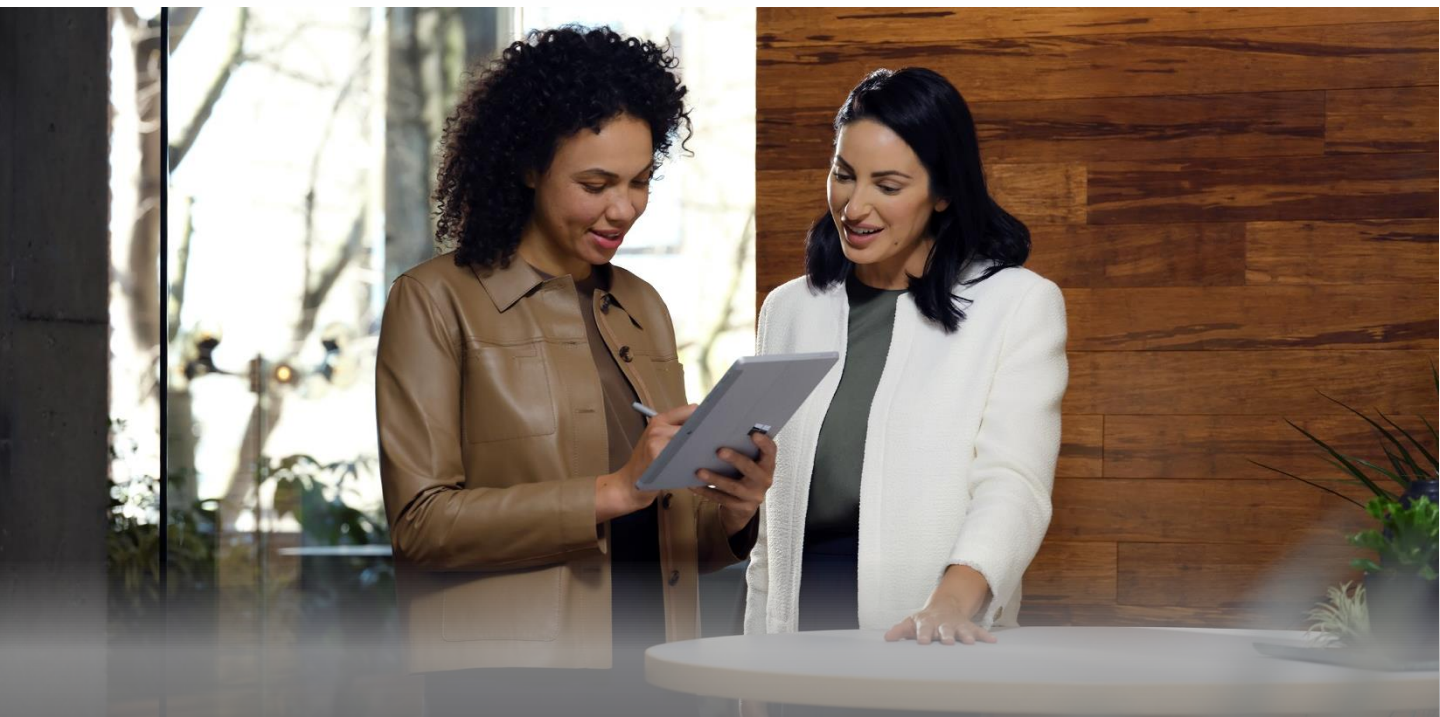


Choose **Surface Pro 9**

The most powerful Surface 2-in-1

Interact with customers with tablet portability, laptop performance, extended battery life.² Portable enough to carry all day, yet powerful enough to replace your laptop and even create a full desktop setup with multiple monitors. Choose the performance employees need for the work they do with either Intel® Evo™⁵ or Microsoft SQ® 3 with 5G.⁴ Type with a laptop-class keyboard and collect digital signatures with a pen⁶ that's charged and always within reach. A Secured-core PC elevates Windows 11 security benefits for employees handling the most sensitive data.

[Learn More >](#)



¹ Surface Go 4 starts at 1.15lb.; weight not including Type Cover.

² Battery life varies significantly based on usage, network and feature configuration, signal strength, settings and other factors. See aka.ms/SurfaceBatteryPerformance for details.

³ Service availability and performance subject to service provider's network. Contact your service provider for details, compatibility, pricing, SIM card, and activation. See all specs and frequencies at surface.com. Availability may vary by market and configuration.

⁴ 5G not available in all areas; compatibility and performance depends on carrier network, plan and other factors. See carrier for details and pricing.

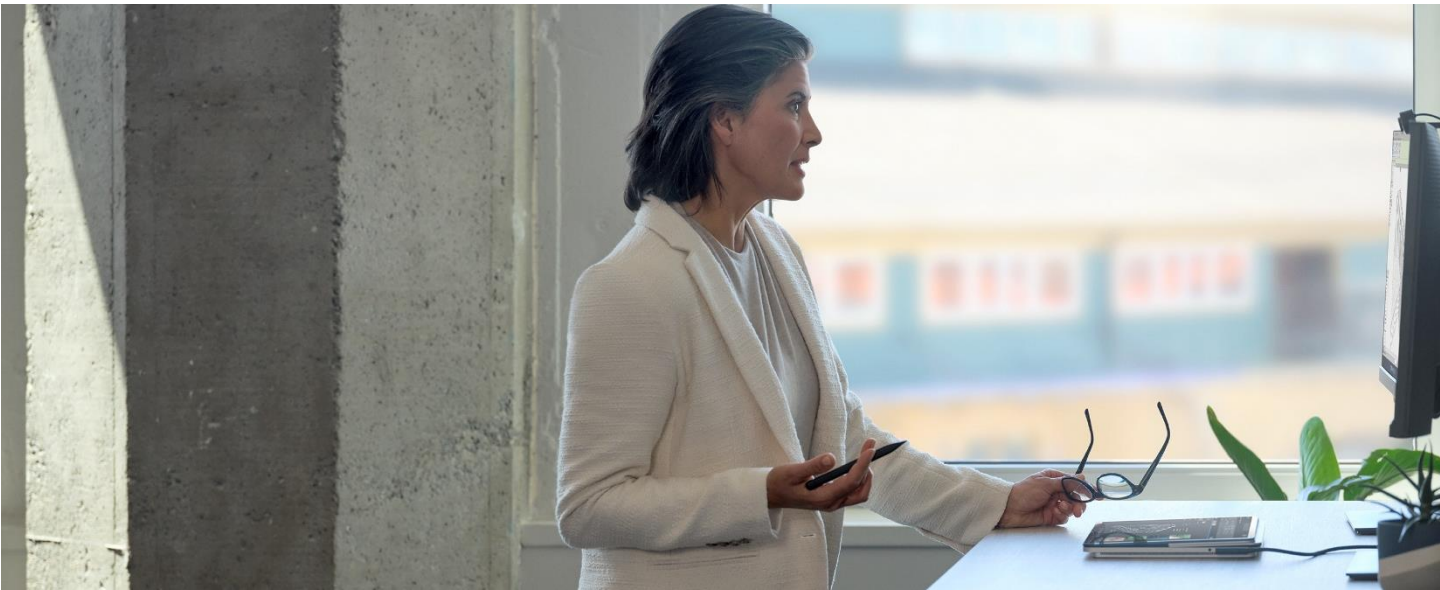
⁵ Surface Pro 9 with 12th Gen Intel® Core™ processors and storage of 256GB and above are built on the Intel® Evo™ platform

⁶ Surface Pro Signature Keyboard and Slim Pen 2 are sold separately. Pen storage and charging available on select Keyboards.

* Sold separately.

Helping clients plan their financial futures

Wealth managers and advisors



Wealth managers and advisors require more computing power to run line of business applications and securely handle client data, when working from the office, home, or wherever their clients want to meet. Hardware designed to work with Microsoft Teams helps to ensure effective communications and collaboration with clients, colleagues in other departments, and management.

Wealth advisors face challenges such as:

- Collaborating virtually with colleagues to determine the best financial plans for clients
- Staying connected and productive when working remote or traveling to clients' locations
- Making a good first impression on new clients
- Effectively communicating new financial products to clients
- Ensuring sensitive client data stays secure

Surface helps wealth managers:

- Make a great first impression with a premium device that projects the bank's premium image to clients.
- Run critical business software and productivity apps concurrently without sacrificing mobility.
- Interact with clients wherever they want to meet with ultra-portable design, extended battery life, and reliable Wi-Fi 6 or optional LTE Advanced or 5G Connectivity.
- View and share financial reports in stunning detail with PixelSense™ touchscreen displays.
- Look and sound great on every Microsoft Teams* call with high-end cameras, optimized microphones, and built-in Omnisonic speakers.
- Engage intently while taking digital notes during financial planning meetings.
- Create the ultimate desktop experience by connecting to displays and docking station in the office or at home with Thunderbolt™ 4, USB-C® and USB-A ports.
- Deliver enterprise-grade protection for sensitive data.

* Sold separately.

For wealth managers and advisors, we recommend:

Need a more powerful device?



Choose **Surface Pro 9**

The most powerful Surface 2-in-1

Interact with clients with tablet portability, laptop performance, extended battery life.¹ Portable enough to take anywhere, yet powerful enough to replace your laptop and even create a full desktop setup with multiple monitors. Choose the performance employees need for the work they do with either Intel® Evo™³ or Microsoft SQ® 3 with 5G.² Type with a laptop-class keyboard and collect digital signatures with a pen⁴ that's charged and always within reach. A Secured-core PC elevates Windows 11 security benefits for employees handling the most sensitive data.

[Learn More >](#)

Do it all



Choose **Surface Laptop 5**

For speed, style, and performance

Get fast, multitasking power to run the professional-grade apps you depend on from 12th Gen Intel® Core™ i5 or i7 processors. Perfect for wealth managers who want to make an impact with a traditional clamshell form factor and our signature ultra-slim design and 13.5" and 15" touchscreens. With USB-C® and Thunderbolt™ 4, you can connect to an external monitor and charge your device. A Secured-core PC elevates Windows 11 security benefits for employees handling the most sensitive data.

[Learn More >](#)



¹ Battery life varies significantly based on usage, network and feature configuration, signal strength, settings and other factors. See aka.ms/SurfaceBatteryPerformance for details.

² 5G not available in all areas; compatibility and performance depends on carrier network, plan and other factors. See carrier for details and pricing.

³ Surface Pro 9 with 12th Gen Intel® Core™ processors and storage of 256GB and above are built on the Intel® Evo™ platform

⁴ Surface Pro Signature Keyboard and Slim Pen 2 are sold separately. Pen storage and charging available on select Keyboards.

* Sold separately.

Determining the best investments for financial success

Investment analysts and executives



Investment analysts and executives face challenges such as:

- Overseeing the health of the business and well-being of clients
- Analyzing complex financial models to create well-researched financial advice
- Collaborating with colleagues and partners to identify investments that yield optimal ROI
- Effectively communicating investments plans to investors
- Staying connected and productive when working from home or traveling
- Being a positive reflection of the organization's brand
- Ensuring sensitive company data stays secure

Surface helps analysts and executives:

- Run sophisticated financial software and complex reporting models without sacrificing mobility.
- Make a great impression with a premium device that projects the bank's premium image to investors.
- Look and sound great on every Microsoft Teams* call with high-end cameras, optimized microphones, and built-in Omnisonic speakers.
- View and share financial reports in stunning detail with PixelSense™ touchscreen displays.
- Engage intently while taking digital notes during investment planning meetings with Surface Pen.*
- Create the ultimate desktop experience by connecting to displays and docking station in the office or at home with Thunderbolt™ 4, USB-C® and USB-A ports.
- Deliver enterprise-grade protection for sensitive data.

* Sold separately.

For investment analysts and executives, we recommend:

Do it all



Choose **Surface Laptop 5** For speed, style, and performance

Take video calls, co-author presentations, and run analytical models simultaneously with 12th Gen Intel® Core™ i5 or i7 processors. Choose the 13.5" size if you're constantly on the move, or the larger 15" display if you need to multitask with split screens. With USB-C® and Thunderbolt™ 4, you can connect to an external monitor and charge your device. A Secured-core PC elevates Windows 11 security benefits for employees handling the most sensitive data.

[Learn More >](#)

Need more power?



Choose **Surface Laptop Studio 2** Our most powerful Surface laptop

Fuel inspiration and ideas on the most powerful Surface Laptop yet with 13th Gen Intel® Core™ processors built on the Intel® Evo™. Take digital notes during planning meetings like you would with pen on paper with Surface Slim Pen 2¹ on the vibrant, sharp 14.4" touchscreen² with refresh rate up to 120Hz. Look and sound great on every Microsoft Teams call* so you can collaborate effortlessly and be extraordinary.

[Learn More >](#)

Give remote participants a seat at the table



Choose **Surface Hub 3** More inclusive meetings and richer collaboration

Give hybrid teams and remote participants a more inclusive way to meet with a modern, all-in-one collaborative canvas and Microsoft Teams-certified meetings platform. Make any space a teamwork space with a large screen device that can be wall-mounted or mobile (with stand + battery³). Present to onsite and remote investors simultaneously with AI-powered Surface Hub Smart Camera that auto frames the video feed for remote participants, giving them the best possible view of the room. Whiteboard strategic plans using the Surface Hub Pen and Microsoft Whiteboard.*

[Learn More >](#)

¹ Surface Slim Pen 2 sold separately.

² Surface Laptop Studio 2 display has rounded corners within a standard rectangle. When measured as a standard rectangular shape the screen is 14.36" diagonally (actual viewable area is less).

³ Salamander Designs Electric Lift Mobile Stands and APC™ Charge Mobile Battery (for Surface Hub 3 50") are sold separately.

* Sold separately.

Layered security with Microsoft Surface

Financial services firms need secure devices, and Microsoft Surface devices provide advanced security out of the box with tightly integrated hardware, software, firmware and identity protection layers. Microsoft uses a layered security approach, with chip-to-cloud security that includes chips and components designed and built by Microsoft, factory security protocols and inspections, Advanced Windows Security features enabled by default, and comprehensive remote management controls.

Surface powered by Microsoft 365³ also helps improve enterprise security by simplifying IT operations through its Enterprise Mobility and Security (EMS) platform, which includes products such as Windows Autopilot, Microsoft Entra, and Microsoft Intune. In addition, Secured-core PCs¹, now available on select Surface devices, are designed to elevate the benefits of Windows 11 security, providing additional hardware and software protection for workers that handle the most sensitive data in your organization.

Hardware

Most Surface for Business devices use TPM 2.0 chips to implement a secure and sandboxed environment for storing passwords, PIN numbers, and certificates. The new Surface Pro 9 with 5G and Microsoft SQ[®] 3 uses Microsoft Pluton architecture to protect sensitive data directly in the CPU, making it more difficult for attackers to access even if they have physical possession of a device. Surface devices are also designed to use Windows Hello for secure biometric authentication.

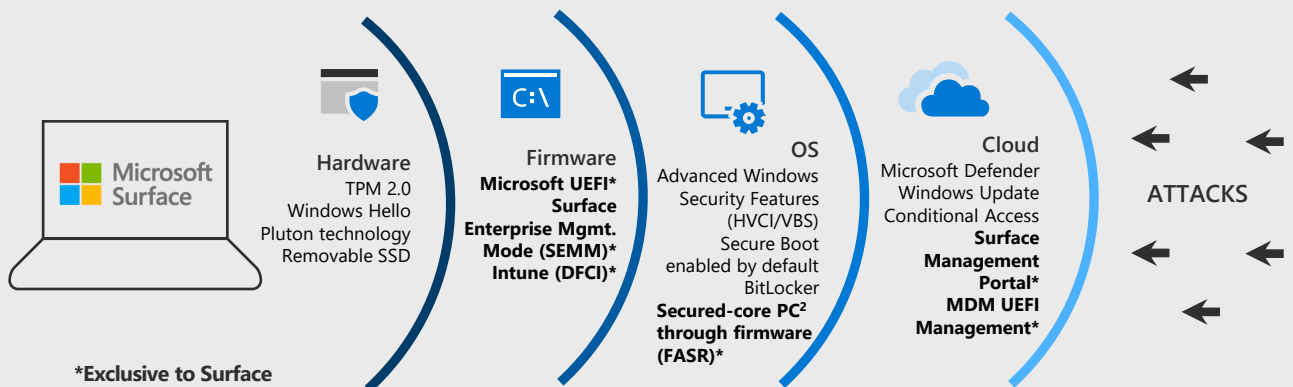
Firmware

Microsoft writes its own Unified Extensible Firmware Interface (UEFI)² which enables IT to manage firmware through Intune and Windows Updates and enable and disable hardware components through Surface Enterprise Management Mode (SEMM) and Device Firmware Configuration Interface (DFCI), so you can reduce risk at the firmware level.

While traditional UEFI implementations require physical configuration, DFCI securely enables zero-touch remote configuration of these settings and is built on Intune and authorized by Windows Autopilot. DFCI provides a straightforward way to easily configure hardware settings, such as disabling cameras and microphones, or disabling boot to USB on Surface devices. These settings cannot be bypassed by a physical attacker or from the Operating System-level because the checks happen even before the system boots an OS.

Operating System

Surface enables Windows 11 security features from the factory. Virtualization-based security (VBS) and Hypervisor Code Integrity (HVCI) help provide better protection against common and sophisticated malware by performing sensitive security operations in an isolated environment. BitLocker encryption protects your business information even on lost or stolen devices.



¹ Surface Laptop Go 2, Surface Pro 9, Surface Laptop 5, and Surface Studio 2+ are Intel based Secured-core PCs powered by Windows 11 through firmware innovation. Surface Laptop 4 with AMD and Surface Pro X with ARM chipset are also Secured-core PC.

² Surface Go and Surface Go 2 use a third-party UEFI and do not support DFCI. Find out more about managing Surface UEFI settings and Surface devices on which DFCI is enabled. <https://docs.microsoft.com/surface/manage-surface-uefi-settings>

³ Microsoft 365 requires paid subscription or qualifying volume license.

Advanced deployment and management

IT teams need a modern approach to device management, one that seamlessly integrates all components, from the chip to the cloud. Surface has been designed with built-in support for simplified modern management of the entire device lifecycle.

Zero-Touch Deployment

Windows Autopilot automates all stages of the device lifecycle, both for IT and users. A Surface device can go straight from Microsoft to the end user completely configured. Surface devices are purpose-built for zero-touch deployment and optimized to provide the most straightforward, friction-free, and powerful interoperability with the diverse collection of Microsoft 365* capabilities.

“ It saves time for our team since I don't need to have an IT resource person physically present at all our branches to set up new devices. Once users receive the device, they can set it up by merely logging in and letting Windows Autopilot perform any data sync or updates. We can also monitor the setup remotely to ensure things proceed smoothly. This will really help us fast-track our expansion to more branches, which we're planning to do in the near future. ”

– *Khaled Althemali: IT Director,
[Awqaf Investment](#)*

Management during use and retirement

Every Surface component, from firmware to Windows 11 policy settings, can be managed by Microsoft Intune* and updated via Windows Update for Business. Using Intune, IT can also wipe a device clean, whether it was lost or stolen or assigned to a different user. After a wipe, the device is reset to the out-of-box experience, at which point proper credentials are once more required for setup if the device is redeployed. Surface Management Portal is a new centralized solution for IT admins to self-serve, manage, and monitor Surface devices at scale in Intune.

In addition, Surface includes purpose-built tools for diagnostics and tuning that can automatically fix issues, assist with troubleshooting, and optimize functionality from brightness control to battery usage. The Surface Diagnostic Toolkit (SDT) for Business, for example, enables IT administrators to quickly investigate, troubleshoot, and resolve hardware, software, and firmware issues with Surface devices — across the network.

Surface also integrates into the Microsoft 365 security stack to detect vulnerabilities across the globe and automatically protect devices—even while they are asleep. Surface devices implement a Modern Standby low-power state that allows devices to appear asleep, drawing very little power, but also listening for updates via Windows Update for Business and application data streams like email. This enables a Surface on battery power to achieve a long standby battery life while also staying up-to-date on application data, and automatic pushes of security updates even down to the UEFI.

* Sold separately. Microsoft Intune requires qualifying volume license and/or subscriptions.

Surface and sustainability

At Microsoft, we believe the needs of our customers can co-exist with the needs of our planet. Microsoft has a commitment to be carbon negative, water positive, and zero waste by 2030¹. We know that Surface plays a key role in helping the company achieve these goals, which is why we have clear strategies and goals for embedding sustainability within our devices and our supply chain, making sustainability a core part of our product promise and design language. We know that we have less than a decade to make a difference by 2030, and that's why at Surface, we aim to create devices that reduce carbon impact across their lifecycles, reduce waste, and are built with integrity.

For example, we designed our Surface Laptop Studio to allow for "stamping," a lower-waste manufacturing technique that reduced our aluminum scrap rate for the product's base by at least 25%, a key contributor to the overall product carbon reduction of 30% versus its predecessor for Surface Book 3 13".¹ All Surface laptop and tablet devices are ENERGY STAR certified³ with embedded efficiencies, getting us one step closer towards the 2030 target of being carbon negative. By 2025, our goal is for our packaging to contain zero single-use plastics, and by 2030 it will be 100% recyclable. Our Ocean Plastic Mouse and new Surface Slim Pen are the first of our products to ship in 100% recyclable and plastic-free packaging.¹

Visit [Surface sustainability](#) to learn more.

To increase transparency for customers and stakeholders, we publish [Life Cycle Assessment](#) results that are contained in our [Eco Profiles](#), along with information about the product's material composition, energy consumption, packaging, ecolabels, product recycling, and other environmental attributes. We also developed a new tool for our Commercial customers called the Surface Emissions Estimator.² The tool makes it easier for Commercial customers to understand the estimated emissions associated with a Surface device or accessories based on use and locations.

“ Thanks to the touchscreen capabilities on Microsoft Surface Pro, we were able to go paperless in our customer engagements. The customer experience is modern and seamless. Plus, we are reducing our carbon footprint and enjoying greater cost savings. ”

- Kyung Hee Jeong, Senior Manager, [KDB Bank](#)



Surface Laptop Studio in transition to Stage Mode with Black Surface Slim Pen 2

¹ [2021 Environmental Sustainability Report | Microsoft CSR](#)

² The Microsoft Surface Emissions Estimator is only available in certain markets and only applies to Surface devices currently for sale. Contact your Surface seller for more details.

³ Download [Eco Profiles](#) for Surface devices.

Modern device strategy for Financial Services

By choosing Surface, financial services firms can implement a modern device strategy for all their employees. Surface is designed for flexible work and built for teams. With a variety of devices and price points that meet the needs of a diverse workforce, your organization can standardize procurement and provide a premium experience to all employees through thoughtfully designed and versatile devices, industry-leading security and remote management controls, and a commitment to sustainable business practices.

“ We don’t want to replicate what we were doing in a pre-COVID environment – we actually want to change the way in which we are working. And all those Microsoft tools that we’re using really enable us to do that. ”

– *Jessie Burrow: Managing Director,
[Direct Line](#)*

“ Having an easy-to-use tablet has changed the way our team functions and interacts. They can work from anywhere and have client meetings and presentations on the go. ”

– *Khaled Althemali: IT Director,
[Awqaf Investment](#)*



Visit [Surface for Business](#) to identify which Surface devices are best for your employees.