

## Credentials

### About – Financial Services Client

The client is positioned as a leading stock broking houses in Singapore, by retail broking size, with an extensive customer base and geographical reach covering ASEAN, and Hong Kong / China markets eventually.

### The Solution – elipva Zephyr Financial Research Management System Makes Customer Experience Fulfilling

Based on the client's objectives and requirements, elipva helped to conceptualized and scoped their business plans:

## Levering on Technology for Improved Financial Analysis

Besides the Asian financial centers, the client has also broadened its business to cover fund management, unit trusts, derivatives trading and corporate finance. Together, with an enlarged capital base, an extended geographical reach and vast regional network, the client offers combined management expertise in stock broking and new business opportunities to its clients. Prudence and aggressiveness will continue to dominate the client's management style as it strives to harness technology and deliver efficient customer service with its wide range of products and services.

### Business Challenge- Leveraging Technology for Improved Financial Research Management

The client knew that in order to keep up with the increased competitive pressure in the financial industry, they needed to drive new initiatives to constantly add value to their service offerings to their customers. Recognising that embracing technology was the key to enhancing service quality, a regional research portal is one of its latest initiatives to extend research materials to a wider pool of audience.

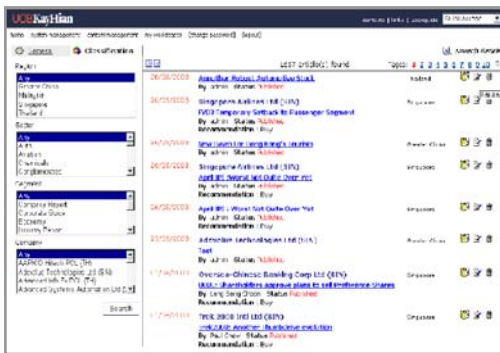
The client required a web-based solution that would effectively manage their financial research materials and be made easily accessible by their clients throughout the world. The system will also be able to publish content, deliver time-critical information and automate traditional tedious processes of managing research materials.

- Supported extended Wealth Management group (stock brokers, private investment officers and priority customers executives) with timely, accurate and detail corporate research and review information for better investment recommendations and decisions
- Enhanced high value customers loyalty by enabling priority customers and institutional clients the ability and ease of accessing research information and other relevant financial information from multiple sources from a single point (portal) for their own analysis and investment planning anytime and anywhere on a personalized, secured and self-service basis
- Reduced costs and speeds up the creation, editing and updating of investment research information by the different research librarians in different countries for their regional offices and customers common and shared use
- Offered both internal and external users the ability to conduct advanced and quick search so that they can access research materials in an efficient and prompt manner
- Enabled easy aggregation of external web content to the research portal so that a wider range of materials can be made available to users, thereby enhancing the perceived value of the research portal

*"elipva has demonstrated an in-depth understanding of our financial practices, and translated our business needs to deliver a fulfilling experience to our clients and employees"*

### Financial Services Client On elipva Zephyr File & Workspace Management

elipva Zephyr E-Business Suite	Visible Results
<b>elipva Zephyr AnyFile</b> One-stop repository of financial research materials and resources	Increased convenience and timeliness to access accurate and detailed research information- anytime, anywhere. Promote better investment recommendations and decisions.
Advanced search and categorization features	Facilitated fast and accurate search results for user specific requirements. Time saved from tedious filtering process.
Easy-to-use template driven content creation and publication	Empowered non-IT users with self-service updating. Cost savings realised from reduced reliance from IT department and little training required.
Scheduled publication with start/expiry date, and auto archival of expired materials	Reduced time-to-market for new content, and speeds up delivery of critical information. Offered ease of mind and frees up valuable manpower resources.
Notification Engine	Increased control and visibility with various levels of authorization and notification alerts.
<b>elipva Zephyr Portal</b> Personalised workspaces & "Dashboard"	Enhanced client experience with personalization tool and self-service personal dashboard. Promoted quick and accurate decision making with real-time, critical financial information at a single glance.
Single-Sign-On	Eliminated inconvenience of multiple logins on web-based and other popular applications such as Microsoft Exchange and Lotus Notes.
<b>elipva Zephyr Framework</b> Access Control and User Management	Increased security and control with proper definition of multiples roles for multiple users. Ensured accurate approval workflow with authorization and alert mechanism.
Open standards Java technology	More flexibility and scalability for customization and future extended needs. Low maintenance and rapid roll-out for the financial institution



**Benefits – Cost savings and increased efficiency in a fast paced industry**

Since the deployment of selected elipva Zephyr modules, the results were apparent. Time and efforts taken to manage research materials and documents have been significantly reduced. With immediate positive effect on staff efficiency, the client also experienced overall increased cost savings through better staff productivity.

Through this web initiative, the quality and value of their service offerings has risen tremendously, with new and innovative services that add value to their clients. Without a doubt, elipva’s technology has enabled their business to be constantly moving with changing demands and staying ahead of competition.

Create new and update existing content easily