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The Navigator for Enterprise Solutions

CAPITAL MARKETS TECHNOLOGY SPECIAL

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20 Most Promising Capital Markets Technology Solution Providers - 2017

The dynamic nature of the capital market industry can be attributed to two major factors: evolving regulations and technological disruptions. In order to acquire more intelligent and streamlined processes performing capital planning and risk management, participants are adopting technological disruptions, such as blockchain or robotic process automation (RPA), that changes the manner in which the market participants buy or sell equity and debt instruments.

In addition to being cost-effective, RPA provides the means for a competitive edge, by using advanced data analytics, which reduces human error and offers higher accuracy and quality. Assigning data analytics and management the crucial role of strategic functioning, businesses are changing their requirements as they move towards a more client-centric approach.

Enabling firms to work on common datasets in real time, with minimal supporting options, blockchain allows market participants a system that is simplified, cost-effective and transparent. Another highly adapted trend that

reduces both expenses and infrastructure is the migration to the cloud that helps transform IT-related capital to usage-based operational expense. Cloud computing and hence, digitization of various parts of the value chains increases the risk of exposure in terms of security. Hence, cyber-security is essential for the protection of clients' data in order to avoid damage to the brand, decline in clients trust and legal suits or investigation.

To extract the full value of technological evolution in the capital market landscape, enterprises often depend on solution providers to fulfill business mission and requirements while providing the right expertise to address the varied and complex needs of the industry. In this scenario, it is imperative that CIO's and CEO's invest in the right technology that suits their specific necessities. With that in mind, CIOReview has charted out 20 companies that are at the forefront of providing comprehensive and value-added capital markets technology solutions.

We present to you "20 Most Promising Capital Markets Technology Solution Providers - 2017."



Company:
Intelledox

Description:
Provides an intuitive platform that provides an easy onramp for financial services firms to deliver greater digital experiences to their customers

Key Person:
Neal Keene,
EVP of Strategy

Website:
intelledox.com

Intelledox Digital Transformation and the Customer Experience

Digital disruption continues to redefine the traditional capital markets industry, putting increased pressure on wealth management companies to provide clients and financial advisors with seamless digital experiences across the customer lifecycle. By making interactions easier, faster, and more personalized, with support for online and mobile channels, financial services firms are aiming to elevate their brand and drive loyalty, while improving efficiency. Providing an easy onramp for digital transformation, Intelledox excels as a strategic partner to enable companies to reimagine the customer experience.

The Intelledox Infiniti platform enables banking clients to simplify customer acquisition, onboarding and everyday service interactions through a combination of next-gen forms, experience-driven workflow, and on-demand customer communications management (CCM). These capabilities allow firms to attract and develop long-lasting relationships with their customers, particularly among high-value segments.

As a low-code, browser-based platform, Intelledox Infiniti empowers firms to redefine how information is captured, providing greater self-service capabilities via digital channels while improving completion rates and eliminating the need for Optical Character Recognition (OCR) or data re-entry. Customers can not only open accounts with multiple language support, generate essential documents or confirmations, and gain instant access to additional information, but also complete their transactions swiftly.

Intelledox Infiniti also enables organizations to automate the business processes around customer interactions without requiring IT intervention. Its flexible architecture provides quick connections to core systems like ECM, BPM, CRM, and ERP, so that companies can leverage known data to complete a form or drive workflow. Business executives can design new applications and processes quickly, saving IT costs and accelerating time to

market. Clients can implement Infiniti and launch their first application within 4 to 6 weeks, depending on the need for system integrations. The platform is available via private cloud or on premise.

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Intelledox’s low-code approach in providing greater front-end user experience and strong back-end integration is a winner for financial services firms

One Intelledox client, a top wealth management firm, sought a single advice documentation tool to help financial advisers create easy-to-read, data-rich advice documents for high net worth clients. Using the Infiniti platform, the client reduced document completion time from one day to an hour. The client also gained direct control of document templates, providing clients with access behind their security firewall. Subsequently, the financial advisors were able to add significant value and improve customer satisfaction.

Another Intelledox client, one of the largest investment brokerages, leveraged Infiniti to replace its library of static forms with an intuitive, adaptive digital interview approach. It has been able to make it easier and faster for clients to open accounts, realign their portfolio or make changes.

“Intelledox’s low-code approach in providing greater front-end user experience and strong back-end integration is a winner for financial services firms,” says Neal Keene, EVP of Strategy, Intelledox. “We’re seeing clients or their customers improve transaction speed by 50-75 percent by eliminating static forms. And, clients are seeing a 20-25 percent improvement in loyalty as shown by Net Promoter Scores.”

Intelledox stands apart from competitors with their capability to leverage data and deliver a personalized omnichannel customer experience. It continues to focus on North American market and looks forward to expanding their regional footprint in Australia and Asia Pacific. With ease of accessibility and customer oriented service as core values, Intelledox is set for an unprecedented growth in the days ahead. **CR**



Neal Keene