



COREBRIDGE Enables CLSA to Operate as a Truly Converged Business

By Raymond Tan

Below is a schematic diagram that captures how Corebridge integrates with voice and data systems:

Regional investment banking house CLSA was seeking to improve CRM integration for traders and analysts, who were constantly on the phone speaking to customers while accessing customer records such as trading histories and outstanding positions.

CLSA was operating isolated towers of voice and data systems and these disconnected environments meant that traders had to manually dial numbers for outgoing calls whilst also manually search for matching customer records.

Company: CLSA
 Industry: Banking
 Location: Hong Kong
 Employees: 1,000+

“In a dealing room environment, every second counts and a disconnected environment meant that precious seconds were lost while performing these routine manual tasks,” said Ian Aniszewski, Manager for Infrastructure Strategies at CLSA.

At the management level, there was no visibility of how traders and analysts were communicating with customers, and in turn there was little understanding of how this was affecting revenues and performance.

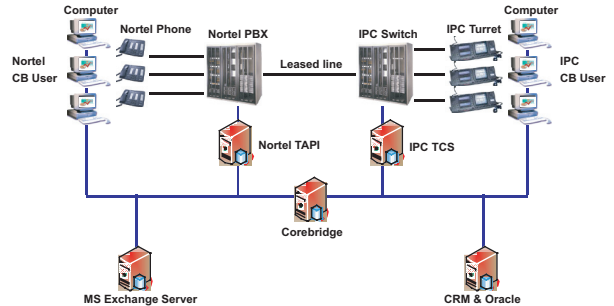
Aniszewski said there was a clear need for Communication Enabled Business Processes (CEBP), to allow traders to simply click on a number in the CRM and the phone or the dealing turret would dial the customer.

This would also eradicate manual dialling errors and reduce the time for traders and analysts to reach their customers, putting them ahead of the competition.

CLSA went to the market looking for a CEBP solution that could address these problems. Aniszewski said that they were looking for a solution that integrated with their existing infrastructure safeguarding their investments to date, was easy to deploy and maintain as well as future-proof, being able to adapt to new technologies and forthcoming protocols such as VoIP and SIP.

“Corebridge’s solution was virtually ‘plug and play’, making the deployment straightforward for the IT team to manage and maintain,” said Aniszewski. He said CLSA now operates a truly converged network, significantly raising their revenue-earners’ productivity, while maintaining their existing systems and infrastructure.

“The Corebridge solution bridges the gap between isolated communication systems and devices and data applications to deliver true convergence between voice and data to improve productivity, customer service and maximize



revenue generation opportunities.”

Aniszewski said key differentiating factors to Corebridge’s winning the project were:

1. Corebridge is hardware-independent and able to work with most existing telephony PBX systems, traditional or VoIP.
2. Corebridge is software-independent and interoperable with most structured business applications.
3. Corebridge is fully interoperable with IPC dealerboards allowing traders to have the full set of telephony functions on their desktops (e.g., click-to-dial, screen-pops, etc).
4. Corebridge is easy to maintain and support. A single Corebridge server was all that was needed to integrate with multiple voice switches, dealerboards and data applications across multiple sites.
5. Corebridge is non-intrusive. Due to Corebridge’s unique method of integrating voice and data, the two platforms continue to operate independently. This ensures that Corebridge deployments are low-risk events, compromising the integrity of neither the voice nor data systems.
6. Corebridge was very quick to deploy. The integration between application and telephony systems was completed in 5 days.

Since implementing the solution, CLSA has identified an increase in call rates across the entire bank. With click-to-dial enablement, CLSA experienced an increase of 20-30% call rates per sales trader.

Adoption of voice-drop has also resulted in user analysts outperforming their peers by up to 50%, and the productivity of staff in the sales and analysts departments have increased by as much as 30%.

“This statistic alone would indicate an aggressive ROI and is driving an accelerated roll out of the solution globally,” said Aniszewski.

Corebridge has since been deployed across CLSA’s offices worldwide and the global roll-out is scheduled to complete in Q1 2007. ★