

TREXCP FOR INVESTOR SERVICES FROM TRITEK AND EMC AUTOMATES WORKFLOWS

Reduces transaction costs, increases operational efficiencies, and improves customer service

ESSENTIALS

- Built on reliable EMC Documentum® xCP
- Increase processing accuracy by up to 80 percent
- Decrease the time required to resolve exceptions by up to 60 percent
- Reduce costs
- Improve overall customer service
- EMC Certified

THE ACCOUNT MANAGEMENT CHALLENGE

Servicing investors can be a costly process for brokerage operations which are too often not equipped to manage the complex and voluminous transactions and queries demanded by agents, businesses, and customers. These companies face a long list of challenges that hinder their ability to provide good customer service and keep costs low. These include:

- Inefficient, manual, paper-driven back-office processes that extend transaction times, breed inconsistency across different types of transactions, and can result in lost service requests
- Lack of access by back-office processors to relevant data that is often buried in enterprise legacy applications
- Inability to deal with the high volume of exceptions common to these transactions—further lengthening the time before processors can effectively respond to agent and customer queries
- Lack of access to up-to-date, complete information by customer service representatives, hindering their ability to immediately respond to customer inquiries
- Inability to effectively distribute workload
- Inefficient performance reporting and metrics to determine if performance objectives are being met

All of these challenges play out against a backdrop of increasing government regulations. Not surprisingly, customer satisfaction suffers and costs continue to rise due to inefficient processes.

REDUCE COSTS, INCREASE EFFICIENCY

TrexCP for Investor Services from TriTek and EMC enables retail and institutional servicing operations managers to automate workflows within their organizations and streamline account management processes. The solution distributes work in a structured manner, integrates with legacy systems, and efficiently manages exceptions—dramatically shortening the processing cycle, increasing productivity, and lowering costs.

With TrexCP for Investor Services, customer requests can be fulfilled quickly, free of the challenges created by traditional, manual processes. And realtime audit logging and performance metrics empower managers to monitor service teams, make ad hoc adjustments, and deliver superior service. The results are elimination of processing bottlenecks and dramatically improved customer service.



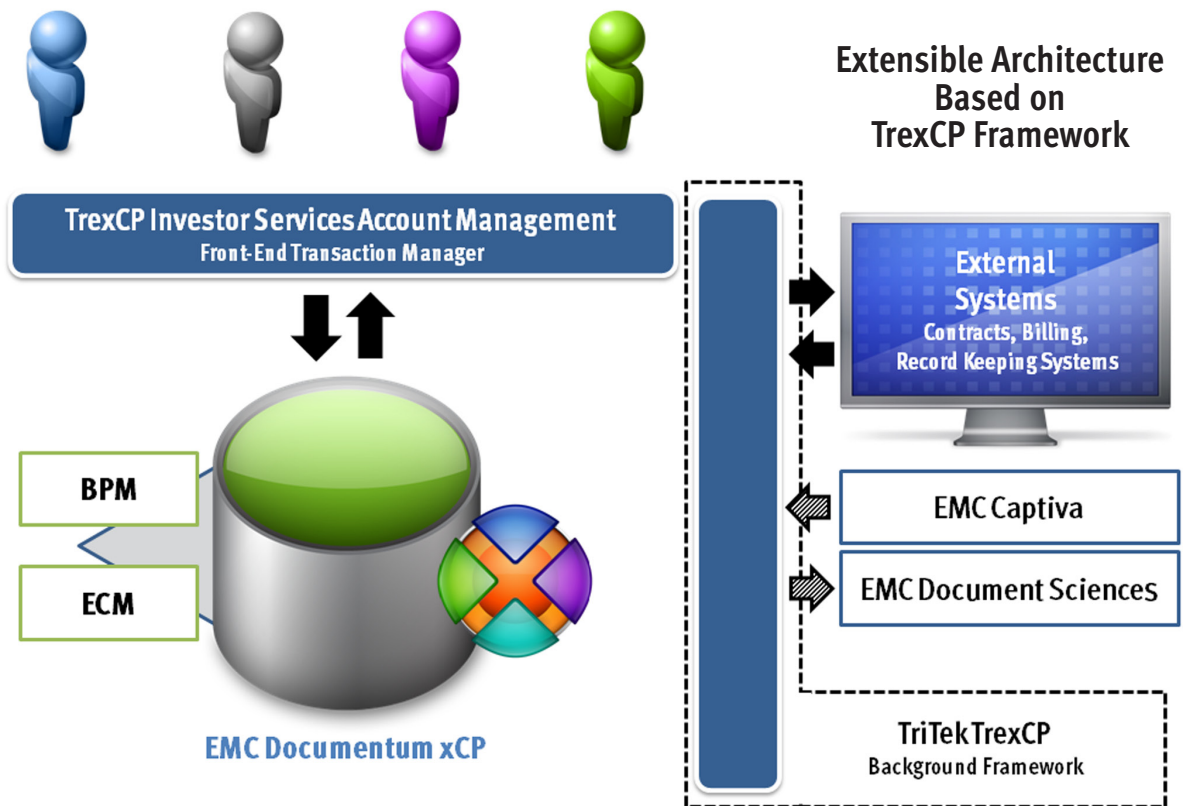
IMPROVE CUSTOMER SERVICE

Built on TriTek TrexCP and the EMC Documentum xCelerated Composition Platform (xCP), the Investor Services solution uses a queue-based framework to organize incoming requests by transaction type and provides a customized processing interface for each. Traditional transaction types accommodated by the system include enrollments, deposits, redemptions, account maintenance, allocation adjustments, transfers, and customer correspondence, among others.

Utilizing the open architecture and customized interface of TrexCP for Investor Services, customer request processors have new power to access and collect transaction-relevant content without compromising their ability to work in a legacy environment. Accuracy can be improved by 80 percent and the time required to resolve exceptions can be decreased by up to 60 percent—allowing organizations to respond immediately and accurately to customer service inquiries, resulting in significantly enhanced customer satisfaction.

MANAGERIAL CONTROL

TrexCP for Investor Services provides managers with significant administrative control and access to performance metrics. The solution's user maintenance utility enables managers to specify the processing permissions for any user, and control access and content to any system queue. By doing so, managers can designate work based on criteria of their choosing, including work volumes, user skills, transaction priorities, and more. In addition, the Workload Manager feature provides managers with a snapshot of what is currently in the system so they can evaluate the performance of both individual processors and the investor services organization as a whole.





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REPORTING DATABASE

TrexCP for Investor Services handles every step in the account process, enabling its reporting database to capture virtually every action. This reporting database enables easy access to any combination of information, and to preset or customizable reports. Managers can create reports using an adopted business intelligence tool (such as Crystal Reports, Cognos, or SAS), a Microsoft Excel spreadsheet, or even a web-based dashboard.

CASE MANAGEMENT WITH EMC DOCUMENTUM XCP

TrexCP for Investor Services is built on the EMC Documentum xCelerated Composition Platform (xCP), which was designed to streamline the development of case-based applications. Documentum xCP provides the entire spectrum of dynamic case management capabilities as reusable components that can be configured into reliable applications. These capabilities reflect years of experience and best practices. TrexCP for Investor Services offers a comprehensive set of the highly integrated technologies required to support case management.

THE TRITEK TREXCP FRAMEWORK

TrexCP is TriTek's award-winning transaction processing application framework. TrexCP for Investor Services provides a highly configurable, user-friendly interface, a robust background framework, and custom processing capabilities designed to meet consistent needs across varied ECM solutions. TrexCP for Investor Services has successfully integrated some of the industry's most popular trading, processing, and record-keeping systems, including SunGard, FISERV, and Summit.



EMC CERTIFIED

This solution carries “EMC Certified” accreditation. This accreditation ensures tight integration and product roadmap alignment between the application and EMC platforms. It further assures that the complete solution can be integrated and configured based on a client’s business processes and associated enterprise applications. Certified applications generate rapid return on investment, shortening time to deployment and replacing expensive customizations.

ABOUT TRITEK

TriTek Solutions is a leader in the design, development, and delivery of customized enterprise content and business process management solutions. Offering industry-specific applications for the financial services, insurance, utilities, and government verticals, TriTek is dedicated to solving the greatly varied and complex business problems of its customers. Having earned numerous industry and partner awards, TriTek’s community-wide leadership status in the implementation of ECM and BPM solutions is consistently recognized. Information about TriTek’s products and services can be found at www.triteksol.com

ABOUT EMC

EMC Corporation (NYSE: EMC) is the world’s leading developer and provider of information infrastructure technology and solutions that enable organizations of all sizes to transform the way they compete and create value from their information. Information about EMC’s products and services can be found at www.EMC.com.

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To learn more about TrexCP for Investor Services from TriTek, visit www.triteksol.com or contact a TriTek representative at services@triteksol.com. To learn more about how EMC products, services, and solutions help solve your business and IT challenges contact your local representative or authorized reseller—or visit us at www.EMC.com

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