

Solution Overview

Global Capital Markets Research Member Portal



OrchestraCMS creates a powerful end to end business platform that seamlessly integrates an omni-channel digital strategy with mission critical apps and data

Global Research and Distribution platforms take many forms but often lack functionality, don't integrate with sales coverage systems and can be expensive to scale and modify as business needs evolve.

OrchestraCMS for Financial Services is a purpose built investment research solution designed specifically for global investment and corporate banking. With OrchestraCMS for Financial Services, global research teams can now seamlessly author, collaborate and distribute investment research (at scale) directly to buy side clients across all geographies.

THE SOLUTION:

- > **Global Research Teams:** Enabled with a seamless experience for research teams to author, collaborate and distribute investment research across digital omni channels
- > **Global Sales Coverage Teams:** Gain full visibility and insight into their clients research subscriptions and readership
- > **Global Buy Side Clients:** Enabled with fully branded, targeted and personalised digital experiences including auto notifications of their topics of interest, favorite analysts and more
- > **Tune Client Service Levels:** Enable your organisation with actionable insights by tracking each client's research subscriptions, readership and online usage behaviour
- > **Compliance and Security:** Inherent controls configured in Salesforce to solve your global regulatory and governance requirements including Mifid II

THE BENEFITS:

- > **Native to Salesforce:** OrchestraCMS for Financial Services securely leverages the Salesforce Platform to surface applications, workflows and operational data across digital channels, while meeting your regulatory and/or governance requirements.
- > **Time to Market:** Optimise your Salesforce investment without costly integrations, implement in months with minimal ongoing costs and zero service interruptions as all upgrades are seamless to end users and require little to no support from your organisation's IT team.
- > **Omni-Channel Experience:** OrchestraCMS for Financial Services and Salesforce deliver targeted content across digital channels, mobile and business applications to optimise productivity and customer engagement. Use our content API's to syndicate your research to 3rd party industry channels and social
- > **Monetise Research Consumption:** Track user and account readership globally, auto generate client payment invoices accordingly
- > **Collaboration & Engagement:** OrchestraCMS for Financial Services delivers compelling digital experiences with fully branded, responsive user interfaces, regardless of device or geographical location.
- > **Risk and Compliance:** Imminent regulatory changes (such as Mifid II Jan 2018) will directly impact the way sell side firms provision their investment research. OrchestraCMS' publishing workflows and approvals, versioning and governance capabilities ensure your content is compliant and meets all your regulatory and/or legal requirements.

