Micro Strategies Inc.
MSI Profiler for Capital Markets

Partner Solution

■ **Business Application**
*Streamlining high-value
documents for improved
customer service*

■ **Target Industry**
Banking and Financial Markets

■ **Products**
*IBM FileNet Business Process
Manager
IBM FileNet Content Manager
IBM FileNet Capture
IBM FileNet Image Manager
IBM FileNet eForms
IBM FileNet Forms Manager*

Business Challenge

To remain agile and navigate shifting market dynamics, companies must ensure the best, most accurate information is available so knowledge workers can make better decisions faster. This yields improved customer satisfaction, reduced processing costs and improved productivity.

Many companies are challenged in handling large volumes of data in an efficient and timely manner, resulting in widespread waste and inefficiencies. Slow manual processes are paper intensive and error prone. Lack of an automated document management system creates cycle time drag throughout the document lifecycle. Documents duplicated across departments in more than one repository contribute to excessive data storage costs.

Faced with multiple information technology system interfaces, users must toggle between applications to validate information in a document, resulting in a significant productivity hit. Inconsistent or outdated information is manifested throughout business processes, creating operational issues downstream such as inconsistent and poor customer service. Time consuming manual system updates can also cause delayed customer response times.

Solution

MSI Profiler is designed for companies dealing in capital markets who process high value documents; it is a document management solution that enables enforced, structured and streamlined processing of incoming documents for:
• Derivatives trading
• Financial operations
• Contract validation
• Back office daily/monthly reconciliations
• New accounts
• Research

The MSI Profiler provides users with a single interface to capture and index data as it comes into the system and automatically launch required processes. This provides the ability to review high value documents and the critical data needed to validate the content of those documents quickly and easily. Users also have the ability to markup or add a secured signature to the document.

The configurable interface enables users to:
• Access external data
• Validate indexed or profiled Information
• Automatically populate document metadata from external systems
• Trigger events in other systems
• Notify users not involved with the document about data now available

Value Proposition

Built to leverage the IBM Enterprise Content Management (ECM) suite of products, MSI Profiler provides value to clients who are looking to maximize the efficiency of their knowledge workers while minimizing the risk and possible exposure from incorrect or outdated information circulating through the organization. The solution's robust interface for processing high value documents can help knowledge workers be more efficient with their time and ensure higher quality work.

Customers deploying the MSI Profiler for Capital Markets can achieve significant return on investment in the following areas:
- Improved accuracy during data processing of up to 80 percent
- A reduction in time required to toggle between multiple interfaces for data validation by 75 percent
- Reduced processing cycles and increased productivity by 60 percent

Company Description

Established in 1983, Micro Strategies, Inc. has distinguished itself as one of the most innovative technology solution providers in the United States. As an industry leader, Micro Strategies is at the forefront of architecting and implementing quality technology solutions with a commitment to responsive, client-first service.

For more information, please contact:

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