

ProCapital strengthens customer relationships with the GMC solution



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Anthony Ginepro - ProCapital manager of electronic publishing

High quality personalization services

ProCapital, the creator and operator of a software platform for online brokerage financial services, is established in France and Belgium. Used by asset management firms and banks, its solution registers, processes and monitors market orders placed by their private investor clients. In accordance with financial market regulations, asset management firms and online brokers are required to issue transaction notifications after every order placed. These are then sent to their clients by mail.

Quality and broad range of services are competitive advantage

"For asset management firms, these mailings provide a real opportunity for communication with their clients," explains Anthony Ginepro, Manager of Electronic Publishing at ProCapital. On an increasingly competitive market, online brokers and asset management firms are also looking to differentiate themselves through the quality of the printed documents they send their clients. This involves presentation as well as the content and relevance of information. Consequently, as a global service provider, ProCapital has enhanced its publishing services. It now offers its customers all the responsiveness they are entitled to expect regarding the personalisation of the documents they receive.

Before adopting the GMC solution, ProCapital was bound to an outsourced publishing solution. Integrating update requests for document templates such as transaction notifications sometimes took several days. In numerous cases, these modifications required a partial or complete rewrite of the application code for managing document composition, even when all that was required was the addition of a data field to an existing document. With this approach, every customer had to be treated as a separate case, meaning that the developments made could neither be shared nor re-used and were therefore more costly. To consolidate its position on the market, ProCapital wanted to find a solution that would enable it to cut the cost of managing its publishing services and improve responsiveness, while offering new services with higher added value.

"The chosen solution needed to significantly reduce the time and cost of incorporating modifications requested by customers."

Single source, global solution needed

"To achieve this we needed to bring our publishing activities back in-house," continues Anthony Ginepro. Once the decision was made, ProCapital began looking for a global

solution to manage its publishing system that would meet its criteria. The chosen solution needed to significantly reduce the time and cost of incorporating modifications requested by customers. The aim was also to simplify the integration of new data and to be able to offer new document personalisation services. This allows asset management customers to promote new financial products to particular investors, or add the name of the client's designated banking adviser to the transaction notification.

"With the GMC solution you can make modifications by simply adjusting the settings."

The GMC solution met all of ProCapital's requirements, allowing it to implement simple and reusable procedures for updating graphics or including data in transaction notifications and management documents produced for asset management firms and online brokers. With the GMC solution, the time taken to incorporate a modification request is reduced to under 48 hours. "One of the reasons for this increase in responsiveness is that with the GMC solution you can make modifications by simply adjusting the settings, and then immediately display an exact view of the result," says Anthony Ginepro. This lets asset management firms and online brokers take full advantage of the space in letters that they are legally obliged to send their clients. Importantly, this means they can respond to developments in the market or changes to regulations and immediately give their clients the data they might need, such as tax information relating to the management of a share savings plan.

Dynamic data sorting and advanced color management

Fully compatible with the XML data architecture of the ProCapital platform, the GMC solution suite facilitates the creation of complex data layouts in the form of embedded tables. The solution also allows dynamic sorting of data so that information can be presented in the clearest, most legible way for the end user. In addition, the GMC solution allows color promotional graphics to be incorporated in management documents, which are traditionally limited to black-and-white text content. This means that management documents can effectively convey the online campaigns of brokers and asset management firms through personalized and aesthetically attractive communications.

Faster, more reliable modifications and updates

ProCapital uses the GMC solution at its two centres in France, as well as in Belgium. In France, ProCapital produces more than 2000 transaction notification letters every day, as well as monthly summaries and statements. On certain days, the GMC solution must be capable of producing several tens of thousands of pages, while adhering to

strict requirements both in terms of the document's appearance and dispatch deadlines. With the GMC solution, ProCapital has made its procedures for managing modification requests faster and more reliable. The solution also allows the use of test data to see how a modification looks before it goes into production.

Flexibility saves time and money, expands business opportunities

The GMC solution now provides far greater flexibility for ProCapital's customers. The use of the software has enabled some of them to eliminate the need to use pre-printed documents, which are always costly and complex to store in sufficient quantities. The GMC solution's dynamic four-color document composition features have enabled ProCapital to enhance its publishing services with the addition of true consulting expertise. Capitalizing on the easy personalization offered by the GMC solution, ProCapital has achieved its goal of bringing new services to its customers, particularly in terms of expert advice on optimizing clarity and legibility through customised studies on how to present information. These recommendations can then be easily implemented in the GMC solution.

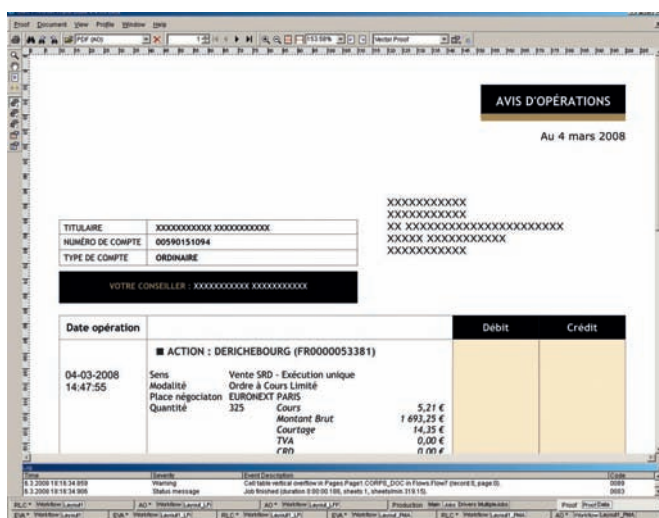
Cutting edge solution offers best value and customer satisfaction

The GMC solution gives ProCapital the operational independence it needs to satisfy its customers' requests at the best price-quality ratio. Asset management firms and on-line brokers can enjoy shared usage of a cutting-edge solution to transform their legal obligation to issue transaction notifications into added value for the company's image and business performance.

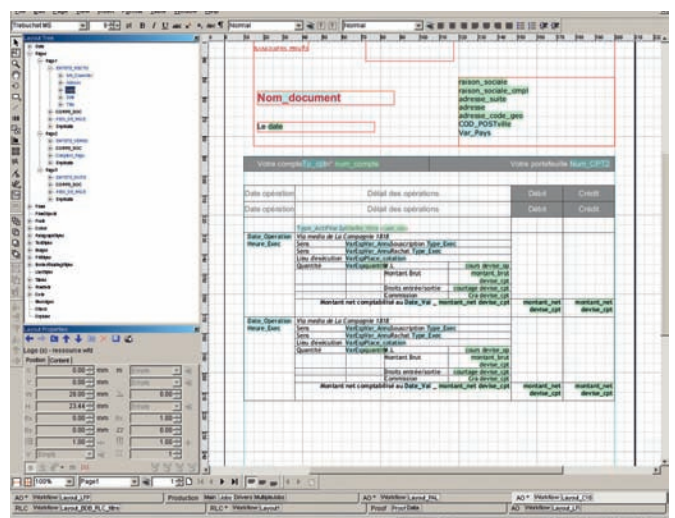
GMC Software Technology

delivers the most effective solutions in the field of Customer Communications Management (CCM). With unrivalled experience in the industry, GMC has consistently demonstrated the ability to help businesses increase customer engagement across all touchpoints. The company's CCM platform, GMC Inspire, enables enterprises to deliver relevant communications, at the right time, through the preferred channel for every customer – driving customer loyalty, acquisition and operational efficiency.

GMC Software Technology serves thousands of clients worldwide across the banking, insurance, retail, business services, telco/utilities and healthcare industry. Having received numerous awards in the field Customer Communications Management, the company is recognized as an industry leader for innovation.



Transaction notification, feat. name of the client's financial advisor



The template for creating documents sent to clients

Key facts

Client

ProCapital is the creator and operator of a platform for financial services. Its solution is used by asset management firms and banks to register, process and monitor orders placed on the market by their private investor clients. ProCapital prints between two thousand and several tens of thousands of documents and transaction notifications with the GMC solution every day.

Challenge

To reduce costs and the time required to incorporate modification requests from customers, as part of the move to bring the publishing of management documents back in-house. To achieve differentiation on the market by providing high value-added solutions, such as the possibility of dynamic, on-the-fly incorporation of information that is personalized for the recipient, for example the name of his/her banking advisor.

Solution

The GMC solution offers a unified solution for personalizing ProCapital's management documents for all of its customers. It has extensive personalization features covering both data and graphics. As a printing expert, GMC has given its software extensive four-color composition capabilities, thus enhancing the publishing services ProCapital offers its customers. With changes made by simply adjusting settings, the GMC solution enables requested modifications to be made in the space of a few hours. These changes can be tested in real-time using the GMC solution functions for immediately viewing results.

Results

ProCapital has been able to considerably broaden its publishing-based services offering, while at the same time respond to its customers' requirements for a solution that is cheaper and more responsive to changes. ProCapital makes particular use of the GMC solution to offer its customers innovative personalization solutions through the use of graphics and the dynamic addition of data.



The Projects and Information Systems team at ProCapital



ProCapital's offices on the prestigious Avenue des Champs Elysées