

## RESULTS

- Happier clients with increased flexibility and information at their fingertips
- Better decision making with a central dashboard
- Increased productivity with automated processes



## CUSTOMER FOCUS

# How GBST Capitalizes Wealth with Lean Processes

## Wealth Management Division Boasts Happier Clients and Increased Productivity

### CHALLENGES

- Vital products were being managed with manual processes
- Lack of process control meant they relied on users to do the right thing at the right time
- Inability to see up-to-the-minute status of projects

With an annual turnover of \$60 million, global client accounting and securities transaction provider GBST demands the highest security, performance and flexibility available from its business software for its wealth management division.

GBST's wealth management division, formerly known as InfoComp, uses Serena Software, a widely used business software and application provider, to manage projects, automate processes and track the progress of product development.

According to GBST's quality manager David Sheaffe, Serena Software's Business Mashup applications have given the wealth management division unprecedented control over the lifecycle and version management of new products, while providing increased visibility to managers and improving production with automated processes.

"The added functionality has increased and improved the controls we have and makes it more visible to users about how the process works," he said. "We can quickly and easily get the status of particular developments in the lifecycle of the product."

"The benefit of Serena products is that they have more flexibility in how they can be deployed and have allowed us to tightly control processes, manage workloads and improve productivity."

GBST took over InfoComp in August 2007, however, InfoComp's relationship with Serena stretches back almost a decade.

Before using Serena, Sheaffe said InfoComp had very little in the way of automated processes in place to manage the life cycle of products.

### PRODUCTS

Serena® Business Mashups

### INDUSTRY

Financial

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— David Sheaffe  
Quality Manager, GBST



"Our products go through stages of coding, testing and releasing to clients, but there was virtually nothing in the way of automated systems to help manage the process, it was all done manually," he said.

One of InfoComp's main products, Composer, is used by some of Australia's largest banking corporations, including Suncorp and Westpac, to manage details of clients with superannuation funds, unit trusts and cash management.

Another InfoComp product, Unison, is a membership management system used by large associations including the Australian Liquor, Hospitality and Miscellaneous Workers Union (LHMU), Maritime Union of Australia (MUA) and the New Zealand Public Service Association (NZPSA).

With both products, Sheaffe said it was vital InfoComp had an application in place to manage projects and automate processes.

"Before we had very little control over processes," he explained. "We relied on users to do the right thing,"

As a result InfoComp decided to use Serena from an early stage to manage the lifecycle process of their products and ensure that the correct processes were followed. This became essential to the growth of the business.

About 100 staff now work at InfoComp, the wealth management division of GBST,

and Sheaffe said all staff members use Serena's Business Mashup applications in one form or another.

InfoComp's clients also have the option of using Serena's business software to track the progress of products in development at InfoComp. They simply log in directly from anywhere in the world using a secure web address to access Serena's Business Mashup. Operating like a web help desk, this allows clients to track the status of their products and submit any issues online.

"This makes it very convenient and simple for them to submit issues, check the status of issues and make any notes they need," said Sheaffe.

InfoComp initially used Serena's product Tracker in the early days, and moved onto the newer application, Business Mashups, once the software became available.

While InfoComp initially sought out Serena's products for development management, the applications are now integrated with project management software and used as business process management tools for a variety of internal issues. These include resource requests, the IT help desk and as an issues register to review internal processes.

Sheaffe said productivity had improved since InfoComp began using Serena's Business Mashups, as a number of previously manual processes were now

automated and linked, making the administration of systems easier.

Mashups allowed users to email straight out of the system and is more flexible in how information can be recorded.

"We are able to give clients more flexibility as to what they can and can't do in the system. Tracker was more limited, but in Serena Business Mashups you can see what's happening, add a note, add an attachment, helping to maintain data without relying on email," he said.

"The feedback from clients has been about the level of performance. They say it is quicker than previous web front end products and it has really made their lives easier," he said.

Sheaffe said the added visibility of Serena Business Mashups meant all issues could be viewed through a central dashboard report, helping managers handle priorities and easily track where teams are up to on a particular project.

In the future InfoComp hopes to use Serena's business products to manage more internal processes, including smaller issues currently handled thru email and spreadsheets.

"Wealth Management sees a lot of opportunity to expand how we currently use Mashups," he said. "It has certainly already improved productivity and we look forward to continual benefits using Serena's products."