



# CAS Workflow

## Discover the power of FDC3 Start Call Intents

### Solution Sheet

### Highlights

- > Automating the Voice Workflow
- > Voice Triggers Contextualised Insights
- > Low-Code Turret integration

### Traders Drivers

- > Elevate Client Experience
- > Frictionless Workflow
- > Amplify Traders Capacity

### Product Manager Drivers

- > Deeper CX engagement
- > Elevating FDC3 Investment
- > Call meta data drive new insights

CAS Workflow elevates Trader's workflow productivity to new levels by delivering contextualised insights based on who you're talking with what you're talking about, without the traditional multiple clicks tax to obtain this insight.

### CAS Workflow elevates:

- > Customers FDC3 Platform Providers with Next Best Actions [NBA] into their messaging centres
- > FDC3 App Owners by deepening client engagement e.g., "Start Call" from within their apps
- > comitFS own Soft Clients & API adds contextualised insights to every conversation

#### Dev-Ops

Our developers have 100+ years' experience in writing and working with API's

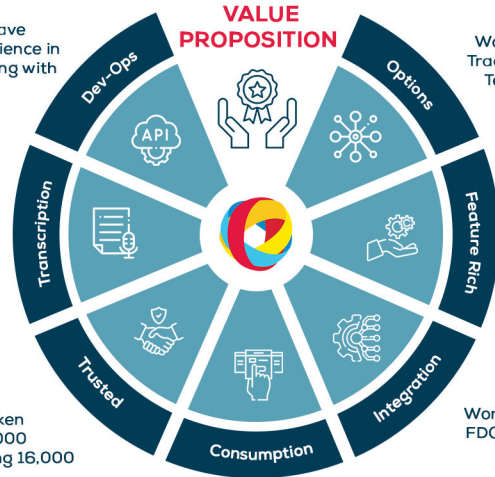
#### Transcription

Leveraging IPC Real-Time Audio Feed, we can embed real-time transcription into the FDC3 workflow

#### Trusted

CAS has Undertaken Robust Testing [1000 Turrets/Generating 16,000 an hour]

### VALUE PROPOSITION



#### Options

Works with IPC Unigy, BT Trading, Cisco & Microsoft Teams [Zoom roadmap]

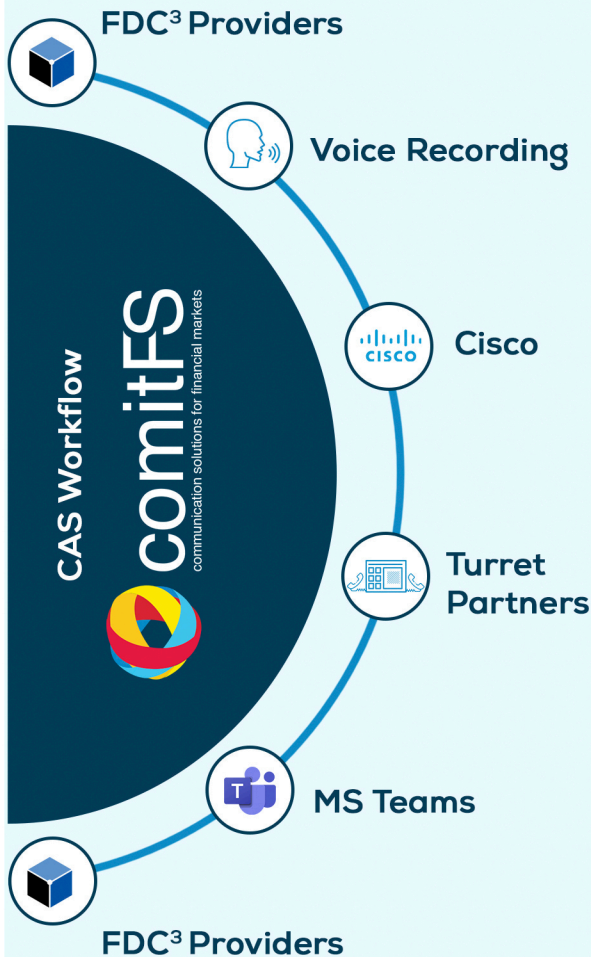
#### Feature Rich

Zero comprise in Turret advance voice capabilities [Barge/Conference etc]

#### Integration

Works out of the box with FDC3 Platform Providers Interop.io, OpenFin & Connectifi

**Consumption**  
Simple subscription model



### Why comitFS?

- > We're an accredited FDC3 Solution Partner
- > 4 of top 10 Investment Banks by fees use our software
- > Our software will work with with interop.io, Connectifi & OpenFin
- > Sandbox testing completed with interop.io & Connectifi



### CAS with FDC3 Inside.

We can enable FDC3 Apps to raise Start Call Intent, any CAS licence will present Next Best Actions Insights. Our modular architectural framework ensures all our workflow productivity licences can consume FDC3.

**CAS Dialler** : Out of the box client that allows click to dial inbound & outbound in your Salesforce and or Microsoft Dynamics CRM

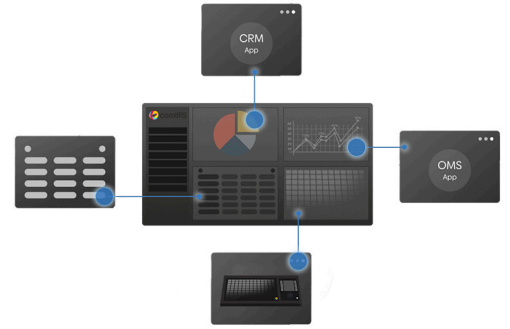
**CAS Client** : A downloaded desktop client that delivers click to dial outbound calls on virtually any telephone number appearing on the desktop

**CAS API** : Our flagship software deigned to provide developers with the ability to embed advance trader voice functionality into banks in-house applications.

## Today Challenges & Risk

Sell Side Traders are constantly seeking marginal gains in workflow productivity to help maintain a point of difference in a crowded market. And yet a high touch conversations traditional incur a tax on a traders as workflow don't seamlessly interoperate with the desktop apps

Bloomberg stated 52% of buy-side firms reported that their processes were too manually intensive and lacked automation, voice has traditionally added to this challenge by not seamlessly integrating with desktop apps



## The Solutions

Start Call

Next Best Action

comitFS Apps/API

ORDER ID	CLIENT	B/S	SECU...	QU
> 20463694	HSBC...	S	VOD LN	
> 20463682	UBS ...	S	VOD LN	
> 20463675	Japp...	S	VOD LN	
> 20463			LN	
> 20463	View Executions		LN	
> 20463	Click for Pre-trade		LN	
> 20463	Click to Track		LN	
> 20463622	Dintr	c	VOD LN	

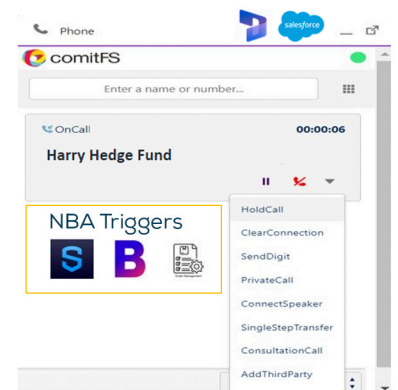
Any FDC3 App can elevate the workflow by raising a Start Call Intent

### Call From Hedge Fund Inc

Refresh Desktop

Open Client Specific Workspace

Calls raise NBA into FDC3 Providers Messaging Centres



Calls Raises NBA into comitFS

CAS One Middleware



## ROI

### Traders

High touch conversation are no longer associated with multi click tax to open client workspaces.

Upon receiving or answer call NBA can provide insights immediate contextual insights. This helps Traders provide a superior service to time poor buy-side customers

### Product Manager Drivers

Product Owners of OMS & EMS apps can mine the data Providing Traders with deeper understanding of the win rate based upon the time lapsed between receiving and responding to an RFQ & IOI.

## About comitFS

comitFS is a market leader in providing customers with a single middleware that ensures regulated conversations on devices work seamlessly within customer applications. Today 5 of the worlds Top 10 Investment Banks by fees choose comitFS.

comitFS is unique our API middleware, CAS (Common Application Server), spans all major turrent vendors and digital workplace operators including IPC, BT, Cisco, Avaya and Microsoft Teams. CAS improves the workflow for multiple personas in wealth, private, corporate and investment banking, allowing our customers to:

- > Accelerate development and agility, providing developers a single API to code against
- > Control costs, CAS software scales across multiple user personas driving savings
- > Mainstream digital first plans, blending high touch conversations with desktop apps
- > Supporting regulatory requirements, ensuring media remains on the regulated user device.

[www.comitfs.com](http://www.comitfs.com)



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