

UBS focuses on enhancing workflow among Senior Advisors

Client Profile



UBS is the leading global wealth manager, a top tier investment banking and securities firm, and one of the largest global asset managers.

Industry

Financial - Banking

Region

Europe

The Challenge

UBS is the leading global asset/wealth manager, top tier investment bank and securities firm. They faced a challenge in obtaining and entering valuable information needed to complete a transaction. Senior Advisors meet with their customers to discuss their portfolios and investment opportunities. During the meeting several forms are filled out. After the meeting the Senior Advisor scans and sends the required forms and notes to the Financial Administrator to enter in to their system. To complete the transaction the Financial Administrator must verify the information with the Senior Advisor. Any changes will need to be made and verified before submission of the transaction. UBS looked to Accenture for a solution to reduce the long cycle time and dependency on their Financial Administrators.

The Solution

Our partner, Accenture, integrated and managed the initial implementation of the ExpeData® Digital Writing Platform for UBS. The solution was designed to enable a Senior Advisor to complete custom forms with a digital pen when meeting with their customers. The digital forms are similar in appearance to the regular forms and the Senior Advisor completes them as they did before.



The Solution Continued

Partner Profile



Accenture is a global management consulting, technology services and outsourcing company. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments.

The handwritten data is automatically transmitted to UBS' back end systems by simply docking the pen into a USB cradle. From there, the Senior Advisor had the ability to easily and rapidly verify the interpretation of the handwriting and submit the transaction without scanning or sending the forms through the Financial Administrator.

The Results

With the implementation of the ExpeData Digital Writing Platform, UBS expects to reach their objectives of increasing the accountability of their Senior Advisors, reducing the number of Financial Administrators needed to process the paperwork and eliminating costly scanning and data entry. They hope to reduce the total cycle time from days to hours, to accelerate revenues.

**“ ExpeData enabled a significant return on investment.
We are expanding from 7 to 30 forms applications. ”**

Accenture



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