# CAS Companion for Investment Banking

**Seamlessly integrate Turret and Microsoft Teams voice capabilities within a single application.**

Solution Sheet

## Highlights – The Three Pillar Framework

**Unified Call Control:**

- One application across common Turret, PBX, UC platforms.
- Integrated directories, for example between Turret and MS Teams
- Simplifying user experience when operating a multi modal workstation.

**Voice Interoperability:**

- Streamlines collaboration between front and back office functions.
- Extends capabilities, such as handling multiple Teams Calls through the turret.

**Streamlines Workflow Integration:**

- Connects voice to common applications (eg Salesforce/Dynamics) .
- Direct integration with containers via FDC3
- Single API across all platforms for custom integrations

## Delivering ROI Across the Organisation

- **Head of Desk:** improved client servicing.
- **CTO:** Maximise corporate investments.
- **Product Owner:** Richer usage insights



CAS Companion

Unified Control

comitFS — communication solutions for financial markets

Voice Interop

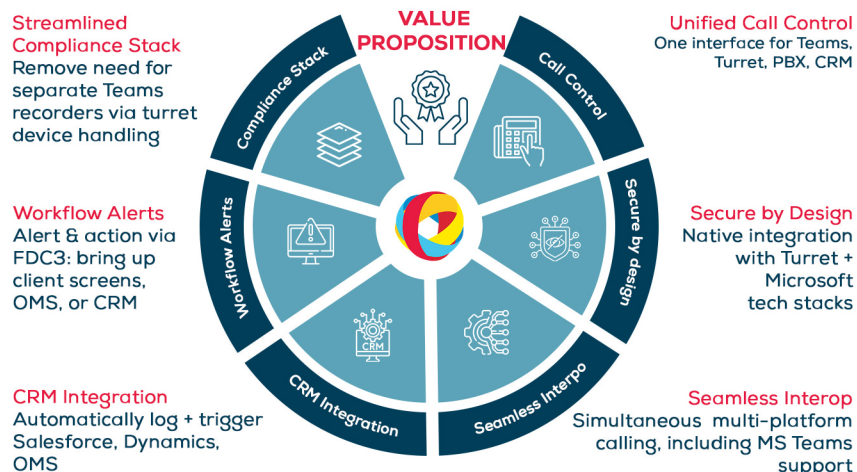Workflow Integration

## Overview:
### Reimagining Voice for the Hybrid Trading Organisation

Financial organisations juggle calls across turret systems, UC platforms such as Microsoft Teams, and enterprise PBXs. Handling client interactions requires uniting people and data from CRM and desktop applications – often through fragmented tools.

CAS Companion consolidates this complexity into a single application – managing voice workflows while delivering only the required data to desktop systems. From call handling to logging and workflow triggers, CAS reduces both cost and operational complexity.

## Value Proposition:
### Simplified Communication for Financial Professionals



**Streamlined Compliance Stack**
Remove need for separate Teams recorders via turret device handling

**Workflow Alerts**
Alert & action via FDC3: bring up client screens, OMS, or CRM

**CRM Integration**
Automatically log + trigger Salesforce, Dynamics, OMS

**Unified Call Control**
One interface for Teams, Turret, PBX, CRM

**Secure by Design**
Native integration with Turret + Microsoft tech stacks

**Seamless Interop**
Simultaneous multi-platform calling, including MS Teams support

## More Time for Client Engagement

CAS Companion is a unified communications overlay that manages the complexity of voice interoperability across Microsoft Teams, Cisco, Turret systems, and PBX environments. By streamlining access to people and information, it reduces platform switching, improves client engagement, and drives front-office productivity.

## More Time for Domain-Specific Projects

CAS Companion delivers a pre-integrated, API-first platform that reduces time-to-market, simplifies support, and avoids duplicated engineering effort across lines of business.
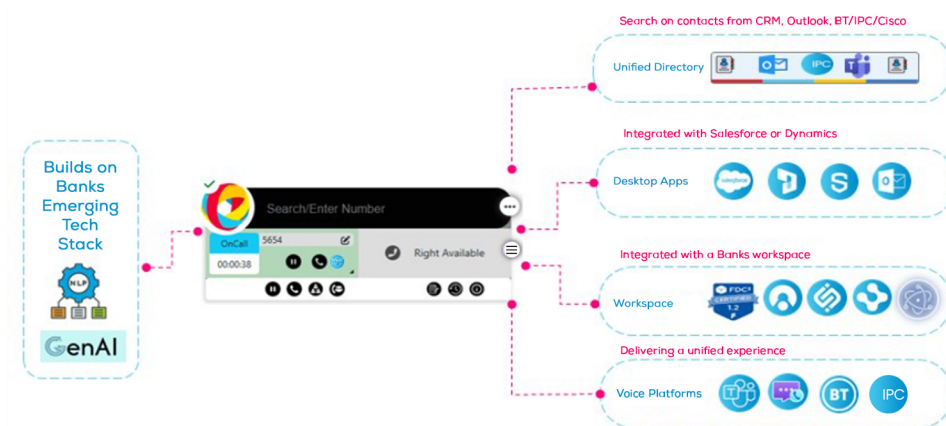By accelerating voice integration into workflows and reducing the total cost of ownership, CAS Companion frees in-house teams to focus on building differentiated, domain-specific applications – where competitive advantage is won.
The platform is also future-proofed for evolving telephony environments and AI trends – enabling seamless adoption of transcription, metadata enrichment, and machine learning insights without re-architecting the voice infrastructure.

## Addressing the Voice Integration Challenge

The trader voice estate is becoming hybrid, where Turrets, Teams and the PBX – all matter.
The challenge? Enabling seamless omnichannel voice access while ensuring compliance, auditability, and performance

## CAS Companion – bringing voice into the desktop workflow



Builds on Banks Emerging Tech Stack

GenAI

Search on contacts from CRM, Outlook, BT/IPC/Cisco
Unified Directory

Integrated with Salesforce or Dynamics
Desktop Apps

Integrated with a Banks workspace
Workspace

Delivering a unified experience
Voice Platforms

## ROI

### MD of Trading Floor

CAS Companion empowers traders with faster access to colleagues and clients by streamlining voice workflows across Turret, Teams, and PBX environments. With fewer toggles and real-time access to the right people and data, CAS Companion delivers to traders the marginal gains that compound into stronger client relationships and measurable bottom-line improvements.

### Trader Voice Product Owner

For Product Owners building applications across sales, trading, and wealth platforms, CAS Companion simplifies voice workflow integration via a unified API layer. Rich metadata from every interaction can be captured and analysed to unlock business insights. By leveraging existing Microsoft and telephony infrastructure, CAS Companion reduces development cost and accelerates time to market – without the need for bespoke voice integration in each team.

### CTO

For CTOs managing enterprise-wide voice strategies, CAS Companion accelerates time-to-value by offering pre-built voice connectors across Microsoft Teams, Cisco, and Turret systems. This reduces complexity for development teams in Wealth and Asset Management, improves release cycles, and supports a scalable, compliant voice architecture across business units.

### Pillar mapping

**Unified Control**

| | | |
|---|---|---|
| ☑ Voice workflows across Turret, Teams, and PBX | ☑ One API layer simplifies voice capabilities across front-office tools. | ☑ Enterprise-wide voice strategies |

**Voice Interoperability**

| | | |
|---|---|---|
| ☑ Access to colleagues and clients | ☑ Built to work across Turret, PBX, and Microsoft UC stacks. | ☑ Pre-built connectors across Microsoft Teams, Cisco, Turret |

**Workflow Integration**

| | | |
|---|---|---|
| ☑ Access to the right people and data | ☑ CRM/workflow-ready, enables capture of metadata and context into core apps. | ☑ scalable, compliant voice architecture & developer integration stack |

## 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 choose comitFS.

comitFS is unique, in that our API middleware, CAS (Common Application Server), spans all major turret 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. The CAS platform provides a range of benefits across the organisation:

› 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

TRANSFORM

WORKFLOW

OVERSIGHT

comitFS
communication solutions for financial markets

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