CAS Dialler

Trader Productivity: Driving CRM Workflow with Voice Integration

Solution Sheet

Highlights

> Seamlessly integrates with Salesforce
> Seamlessly integrates with MS Dynamics
> Unique Trader Voice MS Teams integration
> Lower TCO vs Design, Build and Maintain
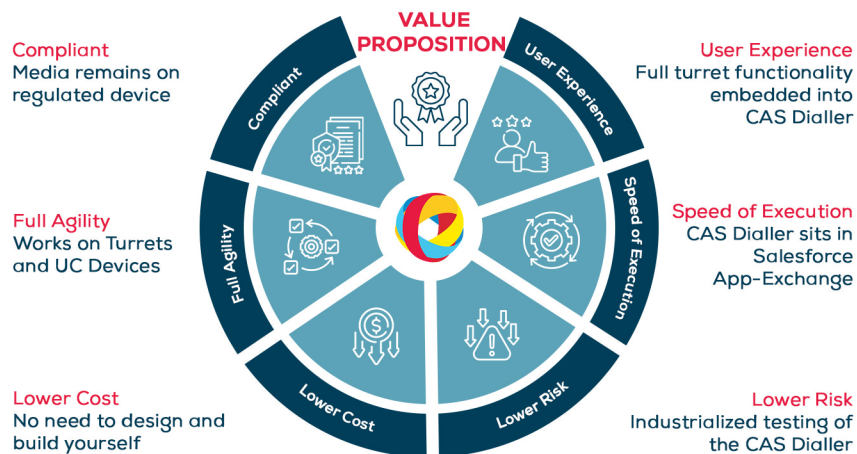> Detailed call history

Key Drivers for Traders

> Enhance Traders workflow productivity
> Multiple calls are easily managed
> Turret functionality available in full

Key Drivers for CRM Product Owners

> Faster time to deploy
> Increased CRM usage results in richer data to mine

With some 58% of organisations expressing challenges in integrating end-user experiences with applications, the need for solutions that cater to the diverse needs of Capital Markets personnel, Including Traders using turrets and Colleagues using platforms like Microsoft Teams or Cisco, has never been more critical.

Enter our CAS Dialler, which has outbound and inbound dialling. It's designed to seamlessly embed the full **functionality** of a turret or a Cisco phone to a CRM. Compatible with leading platforms such as **Salesforce or Microsoft Dynamics**, the CAS Dialler offers real-time workflow and productivity benefits.

VALUE PROPOSITION

Compliant
Media remains on regulated device

Full Agility
Works on Turrets and UC Devices

Lower Cost
No need to design and build yourself

User Experience
Full turret functionality embedded into CAS Dialler

Speed of Execution
CAS Dialler sits in Salesforce App-Exchange

Lower Risk
Industrialized testing of the CAS Dialler

- Trader Voice
- Enterprise Voice
- Voice Recording
- Salesforce Connector
- Microsoft Dynamics Connectors

comitFS
communication solutions for financial markets

What sets us apart from other Telephony integrations?

Traders rely on seamless collaboration with their colleagues, using Microsoft Teams. Leveraging our extensive expertise in both Turret and Microsoft ACS API's, we have developed an innovative way in which Traders can call or invite a Teams colleague to join a call using only their email address, thereby facilitating seamless collaboration.

Many customers encounter significant delays in executing their transformational plans due to the complex process of replacing turret or enterprise voice devices within their CRM systems. Our CAS middleware alleviates this complexity for CRM owners by offering an interface compatible with turret and enterprise voice devices.

Secure by design, CAS Dialler integrates seamlessly with leading access management software such as Azure AD, Hashicorp Vault and Site Minder. Adhering to industry-leading standards not only ensures compliance but also expedites the adoption process for our customers.
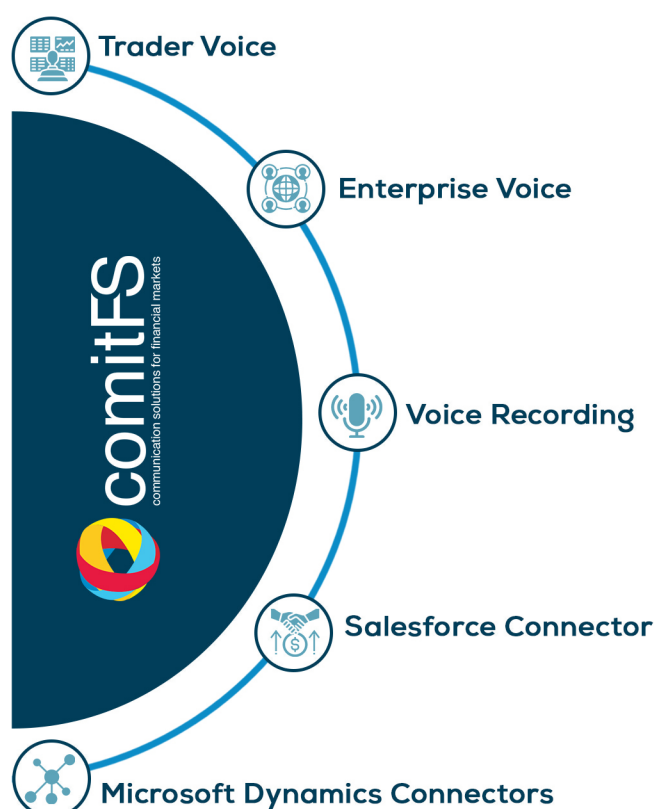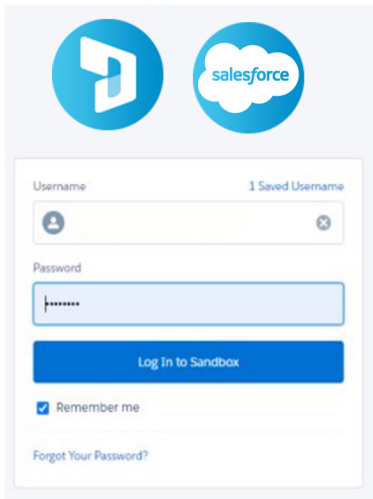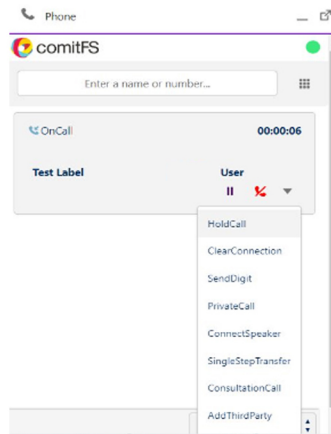
Today Challenges and Risk

A recent survey indicated that 86% of Sell Side firms recognize the critical importance of workflow automation. CRM product owners are confronted with a significant challenge: ensuring high-touch conversations integrates seamlessly with Banks' CRM applications
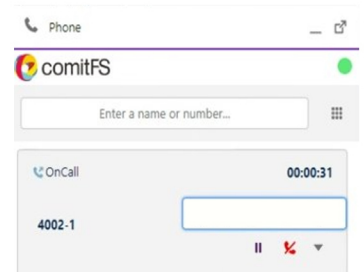
CAS Dialler

1. Login to CRM

2. Call Answered

Full Turret Functionality

3. Colleague Collaboration

Invite Microsoft Teams Colleagues onto a Call via their email address

ROI

Traders

Silos are a barrier in creating integrated user experiences for 90% of clients. The CAS Dialler allows traders on turrets to seamlessly collaborate with both their customers and colleagues from their CRM pane of glass.

90%

Head of Desk

The CAS Dialler has the ability to see missed calls from the call history. It acts as an aid to the Head of Desk in obtaining better insights due to the seamless integration to the CRM activity field, which team members regularly update.

CRM Product Owner

As banks' average expenditure in CRM is projected to rise by 15% annually until 2031, the CAS Dialler stands out as a catalyst for improved ROI for product owners. They achieve this by seamlessly integrating every high-touch call with the customized workflow of each trading desk, thereby optimizing efficiency and maximizing returns on CRM investments

15%

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

www.comitfs.com