

# Customer Success Story



## Customer:

Leading private bank based in Germany

## Challenge:

The bank was looking for enhanced voice trading and communications functionality following a merger.

## Solution:

Connexus Unigy, Unigy Soft Client, comitFS Productivity Tool with Teams Integration

## German Private Bank Case Study

*IPC Systems enhances voice trading connectivity, functionality, and efficiency for leading private bank in Germany following merger.*

### CHALLENGE

As a result of a merger in 2021, the German private bank required several legacy IT infrastructure contracts be consolidated and renewed. Trading and voice recording systems were managed within its overall IT infrastructure function. Among its core requirements were leading-edge voice trading functionality, cost-efficient solutions, and high-quality service.

One entity had been using the Unigy Trading System since 2012 while the traders at the other entity used Cisco phones.

The Head of Financial Markets Sales was already using the Unigy Trading System and determined it was critical to the bank's future trading strategy. This was particularly important with respect to additional functionality, workflow efficiencies, and mobility available beyond standard telephony systems. For example, this client required efficient oversight over a geographically dispersed team of traders in Germany and the ability to manage and hold meetings remotely with the entire trading team. The bank also needed click-to-dial functionality, integration of (access to) its corporate directory of contacts and importantly, seamless integration with Microsoft Outlook and Microsoft Teams.

The Head of IT's requirement was to outsource the service and operation for the Trading and Voice Recording system to IPC and minimize the engagement of other 3rd party IT service providers.



# CUSTOMER SUCCESS STORY

## SOLUTION

This bank replaced legacy Unigy Trading systems and Cisco technology with its award-winning, Cloud-based, Connexus Unigy service, delivered in a cost-efficient and effective 'SaaS' (Software as a Service) subscription model.

A demo of Connexus Unigy to a team led by the Head of Financial Markets Sales (overall decision-maker) was instrumental in the selection of the Connexus Unigy service for the combined entity's trading function. The further integration supported by the comitFS productivity tool provided requested integration with Microsoft Outlook and Teams. This allowed for the streamlining of several workflows into a single, configurable user interface.



## RESULTS

The strong personal relationship between the client and IPC's German team - across sales, account management and technical support - was a key factor in securing the opportunity.

Following demos, IPC was contracted to deploy Connexus Unigy, including the implementation of state-of-the-art financial terminals, to a total of 21 traders in a staggered rollout across trading locations in Munich, Frankfurt, Hamburg, and Dusseldorf.

In addition, the traders can use IPC's award-winning Unigy Soft Client to work remotely, with no degradation of service quality with respect to trading network/counterparty access, security, compliance, and service functionality. With the provision of the comitFS productivity tool, the traders have access to click-to-dial functionality and full unified communication integration with Microsoft Outlook and Teams.

### Client Benefits

Enhanced trading communications technology through:

- Deployment of 21 leading edge financial terminals across Munich, Frankfurt, Hamburg, and Dusseldorf trading locations
- Implementation of Connexus Unigy across trading floors via a Software as a Service subscription model
- Unigy Soft Client supports secure, compliant remote access and full trading and communications functionality

### IPC Benefits

Direct engagement and stronger relationship with the German Bank.

- Technological Advantage
- Runs independent of PC, ensuring continuity
- Trading system is able to offer functionality beyond what a standard phone system can, vital for successful implementation of trading strategies
- comitFS tool allows for integration of software such as Microsoft Teams & Outlook
- Integration with Connexus allows for remote access via Unigy Soft Client and Unigy Mobile Client

