

# Customer Success Story



## Customer:

Bank Hapoalim BM

## Challenge:

Enhanced trading CRM

## Solution:

Blue Wave API technology to enhance trading CRM functionality

## Benefits:

Please see Client benefit

## Bank Hapoalim Case Study

*IPC Systems integrates solutions with Bank Hapoalim's TraderWind Customer Relationship Management (CRM) platform via Blue Wave® API technology*

IPC Systems partnered with Israel-based Magalcom to design and implement a technology solution to integrate Bank Hapoalim's telephony capabilities seamlessly within its FTL TraderWind dealing room CRM application.

## CHALLENGE

Bank Hapoalim BM was founded in 1921, and as such is the oldest and largest domestic bank in Israel. Since then, it has developed an extensive global presence; its international banking division delivers a broad range of financial markets products and services in Israel and overseas, including securities trading and brokerage.

In this case, Bank Hapoalim sought a **cost-effective, efficient solution to enhance its customer relationship management capabilities** and support increased trading communications and surveillance requirements. Bank Hapoalim wanted to take advantage of sophisticated open-source API technologies and to leverage existing systems and applications to create an integrated, enhanced CRM solution to support its trading activity and customers.

## SOLUTION

This multi-party, complex integration solution brought together IPC Systems and Magalcom, an Israel-based solutions partner and a well-established industry leader in communications integration, computing, and security solutions. **The tailored solution was designed and implemented using IPC Systems' innovative Blue Wave API technology.** In addition, the Blue Wave was fully integrated with FTL's TraderWind CRM application to support Bank Hapoalim trading activity and to maximize and optimize revenue generation from trading.

Specifically, Bank Hapoalim **wanted efficient and seamless consolidation** of voice trading communication and activity within its TraderWind CRM platform, and to be able to link all of its trading end points to obtain a more timely, comprehensive and accurate view of all trading activity.

# CUSTOMER SUCCESS STORY

- Magalcom deployed **IPC's Blue Wave API technology on the Unigy platform with NICE's CRM integration** license enabling the FTL TraderWind application to communicate with voice systems. FTL connected TraderWind to IPC's Blue Wave and NICE's recording platform.
- **FTL customized Bank Hapoalim's TraderWind** application to align screens and data presentation with the bank's requirements. It deployed systems servers and databases onsite, integrated within the bank's IT infrastructure.
- **Bank Hapoalim's dealers were trained on using the TraderWind platform** and after a limited initial deployment, the solution was rolled out to all dealers

By leveraging Blue Wave's innovative development platform – used by IPC Systems to create its own proprietary applications – Bank Hapoalim benefited from more efficient integration of voice trading related data within TraderWind, deeper business insight for enhanced trading workflow, and more trading opportunities with clients.

## RESULTS

Another successful deployment in collaboration with Magalcom was adopted very swiftly by Bank Hapoalim's dealers, enabling them to easily share information and efficiently capture all client interactions, supporting enhanced trade monitoring and management.

Customer trading details are more transparent to dealers and can be more aligned with trade limits and compliance-related information, not readily available previously at the point of interaction. This data is also very important in supporting internal compliance teams to enforce, monitor, and fulfill regulatory reporting obligations. Further, the deployment facilitated the implementation of more proactive, client engagement processes and opportunities to generate additional trading revenues.

### Client Benefits

- **TraderWind platform leverages Unigy integration** to identify customer calling parties and consolidate vital information from various systems within a single dashboard.
  - Timely, efficient voice and data integration for greater automation of trading workflow
  - Use of BI to support trade data/interaction analysis
  - Enhanced reporting: Compliance and trade reporting
  - Effective personal and group productivity tools
  - Multi-channel communication enhanced focus on all client interactions means current and future

### IPC Systems benefits

- **Magalcom's market-leading profile** and long-established reputation for service excellence is aligned with IPC Systems' philosophy of delivering the best possible customer service experience, wherever the client is located.
- **Highly effective collaboration with Magalcom** to design and implement complex integration leveraging IPC Systems' Blue Wave (for Unigy) technology to enhance Bank Hapoalim's TraderWind trading application.
- **A functionally enhanced, trading communications model** can be rolled out to other banks and financial institutions worldwide.
- **Effective expansion of IPC Systems' global footprint** through partnership and collaboration with Magalcom to provide on-the-ground expertise and support.



# CUSTOMER SUCCESS STORY

## IPC Systems

IPC is a technology and service leader powering global financial markets. We help clients anticipate change and solve problems, setting the standard with industry expertise, exceptional service and comprehensive technology. With a customer-first mentality, IPC brings together one of the largest and most diverse global financial ecosystems spanning all asset classes and market participants.

As the enabler of this ecosystem, IPC empowers the community to interact, transact and react to market changes and challenges, and we collaborate with our customers to help make them secure, productive, compliant and connected.

## IPC Systems' Blue Wave

Developed in conjunction with IPC Systems and Unigy, the **Blue Wave Application Development Platform** is a revolutionary, open standards, Service Oriented Architecture (SOA) environment that supports simple and fast development of new applications and solutions for enhanced productivity and business efficiency. Specifically, Blue Wave empowers IPC customers with the ability to develop new trading tools that can be implemented quickly within trading workflows.

## FTL and TraderWind

Financial Technologies (FTL) was founded by a group of trading room technology experts who teamed up to harness innovative technologies to develop solutions focused on increasing trading volumes and value.

A long-standing collaborator with Magalcom, FTL leverages Magalcom's partnerships with leading trading room vendors including IPC Systems to deliver systems integration and installations such as telephony systems.

TraderWind's innovative technology and system design focuses on increased revenue generation from trading activity.

Combining advanced technology with decades of dealing floor experience, TraderWind helps trading room managers identify and act on overlooked business opportunities, from proactive trading to voice data integration, empowering traders with greater power, speed, control, and accuracy.



## MAGALCOM SPOTLIGHT

Israel-based Magalcom is a market leader in integrated communications, computing and security solutions and services, with more than 30 years' experience in designing and delivering fully integrated technology solutions.

Backed by Telrad, the global provider of end-to-end wireless telecom solutions, Magalcom partners with some of the world's leading companies to support a wide spectrum of industries with tailored communications and computing systems.

For more information, visit [www.magalcom.com](http://www.magalcom.com)

Magalcom is a long-standing partner of IPC Systems, collaborating on many integration projects in Israel and other countries.

