



Client Communications and Client Reporting Equipos Coric

Versatile yet cost-effective solutions for exceptional client service and operational efficiency

For institutional asset managers and private wealth management firms the delivery of high quality, tailored client communications has never been more important. In times of economic uncertainty clients are reassured when they receive reports that include comprehensive data, analysis and advice presented in a clear and visually appealing format.

Equipos Coric is a feature-rich software suite that manages the entire end-to-end reporting process. Coric enables effective data sourcing and manipulation, automation of business processes, accurate audits and performance tracking, and the design, personalization, production and distribution of stylish reports.

Coric is the most robust, agile and scalable client communications solution available in the marketplace today.

Quick to implement and cost-effective to run, Coric delivers a wealth of benefits and the shortest time to value.



Automated client communications and client reporting

Empowered client services

Coric's layout building tools are so intuitive that users proficient in Microsoft Excel or PowerPoint can build and manipulate layouts with ease. Client services teams can respond to client change requests quickly and effectively, without involving IT or Equipos. Response times are cut and technicians are free to focus on other business-critical projects.

Operational cost savings

There are many ways in which Coric cuts costs. By automating key reporting processes, increases in production volumes can be managed without adding to headcount. Productivity improves and less time is wasted correcting human error. Web-based delivery is increasingly popular; for investment management firms with a high proportion of clients opting in to paper-free reporting the savings in paper, print and mailing can be considerable.

Greater business efficiency

Coric's advanced business process management component enables vast quantities of reports to be generated in a timely, efficient manner, using less manpower and eliminating human error. Data validation and quality checks are regularly performed to ensure data accuracy and report reliability.

High quality, personalized output

When communications are tailored, clients know they are not just one in a crowd. When financial information is presented in a visually appealing, professional way, clients can truly understand the significance of the report content and respond quickly to changes in portfolio performance. However clarity of presentation is increasingly difficult to achieve, given the rapid rise in regulatory controls that require more in-depth, complex information to be reported.

Coric allows client services teams to apply different layouts, orientation and chart styles to deliver highly complex client data in a way investors can relate to. Reports are easily customized, which facilitates the creation of highly targeted communications, regardless of volume.

Reinforced branding

Coric enables clients to apply corporate branding and style guides to the design of all client communications, thereby promoting consistency across the enterprise.

Multi-tenant support

Equipos is without doubt the market leading provider of multi-tenant client communications solutions; we have live global reference clients using Coric in this way to deliver exceptional client service. Third Party Fund Administrators responsible for multiple clients use Coric in a multi-tenant configuration, which ensures data is segregated within a single deployment stack. Stringent security measures ensure that data and reporting for one client is not affected by the activities of another.

Greater management control

The reporting function is clear to see across entire lines of business. Coric's easy-to-use dashboards provide a snapshot of commitments made to clients at any given time. Coric provides a failsafe audit trail to ensure compliance, minimize operational risk and aid management review.

Grows with your business

Coric is inherently scalable. Its architecture supports significant increases in document production volumes, or the addition of many new clients, without costs spiraling out of control.

Choice of delivery mechanism: print or online

Whether clients want to receive communications in printed form or from their desktop computer, laptop, tablet PC, smart phone or other mobile device, Equipos has the solution. The standard Coric offering provides paper-based reporting capabilities. When integrated with the Coric Web Reporter module our clients can deliver 24/7 online portfolio services to their clients, wherever they are located.

Global reach

Coric is used by clients across three continents to efficiently manage their reporting processes. We support configurations requiring multi-language support and our Coric KIID solution enables documents to be translated into any EU language.

Want to learn more?

For a demonstration of Coric Client Communications call
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