



Quilvest Switzerland uses Flowable to streamline and digitize securities processes



Quilvest is an international wealth manager, headquartered in Zurich. Founded in 1932, the long-established company follows a comprehensive approach to provide innovative investment opportunities around the world. This includes alternative asset management strategies as well as increased return opportunities for clients. One of Quilvest's focus areas is the environmental, social, and corporate governance (ESG) trading. Today, Quilvest has approximately 100 employees and manages more than \$8 billion in assets.

Digitalization with a customer centric approach

Since its beginning, Quilvest has been providing management and investment expertise to affluent private clients and families with sophisticated customer needs. Such a business requires numerous complex and demanding processes. To benefit from more efficiency and usability, Quilvest searched for a matching digital business process management solution.

Their primary intention was to further develop the exceptional customer experience as they are building on the trust and loyalty of their clients. Accordingly, the two main digitalization needs were: Automating various processes within the company and establishing paperless mapping procedures

with the overall goal of renovating the banking system through digital process orchestration.

Flowable's low code capabilities bring high usability and early value

The financial experts evaluated three workflow solutions. Eventually, Flowable Work was the chosen workflow management platform:

Low code is one of the key characteristics of the Flowable automation platform. It allows users to model processes, rules, and use cases, without in-depth programming know-how. With Flowable Work, Quilvest can easily design forms and applications with the click of a mouse, and use the drag-and-drop functionality to visually model their processes.

SUCCESS STORY

Flowable Work’s user-friendliness and simplicity convinced us. We are now able to design the graphical user interface ourselves. Flowable offers a comprehensive platform, that can be easily adapted to our business needs and the market changes.

Simon Gassmann, CIO and Managing Director at Quilvest



Digital, compliant, audit-proof asset management

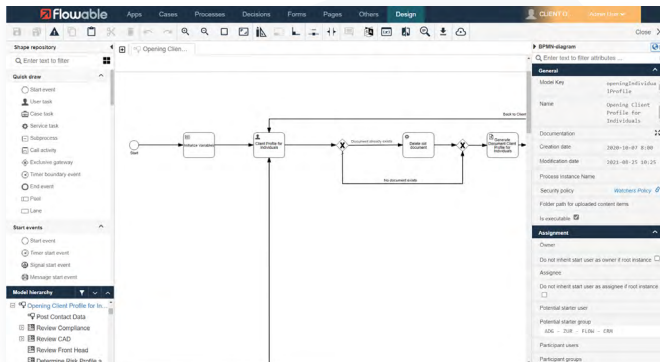
Quilvest’s goal was to digitalize the complete stock exchange business from front-end to back-end with Flowable. Meanwhile, audit security is ensured at all stages:

- ✓ Identifying the pilot project: digitalizing securities trading for customers with external portfolios.
- ✓ Identifying relevant processes: orders to buy/sell, investment reviews, order executions, and order confirmation shipments.
- ✓ Getting everyone on board: different departments generate and exchange documents that verify each step to make the whole process audit-proof.

- ✓ Using Flowable to successfully automate and digitalize all processes: Quilvest meets all legal requirements and benefits from more efficiency and a better customer experience.
- ✓ The result: a fully automated process. All processed information is now compiled in one document, which is automatically sent to the Customer Relationship Management (CRM) and archiving system.
- ✓ The benefit: a more efficient handling and a central electronic archive that can be searched for customers, orders, and processes.

Real-time monitoring for better business decisions

The Flowable automation platforms brings various further enhancements to Quilvest. A matrix works in the background of the digitalized processes, controlling which fields are mandatory and which ones optional. Thus, Quilvest client advisors can rely on an automated guidance throughout the process. In addition, the Flowable Work dashboard provides a real-time process status query. At any time, it shows the status and progress of customer orders in the process chain and gives precise evaluations. Also, the process provides Quilvest with the option to control their business volumes from the user interface.



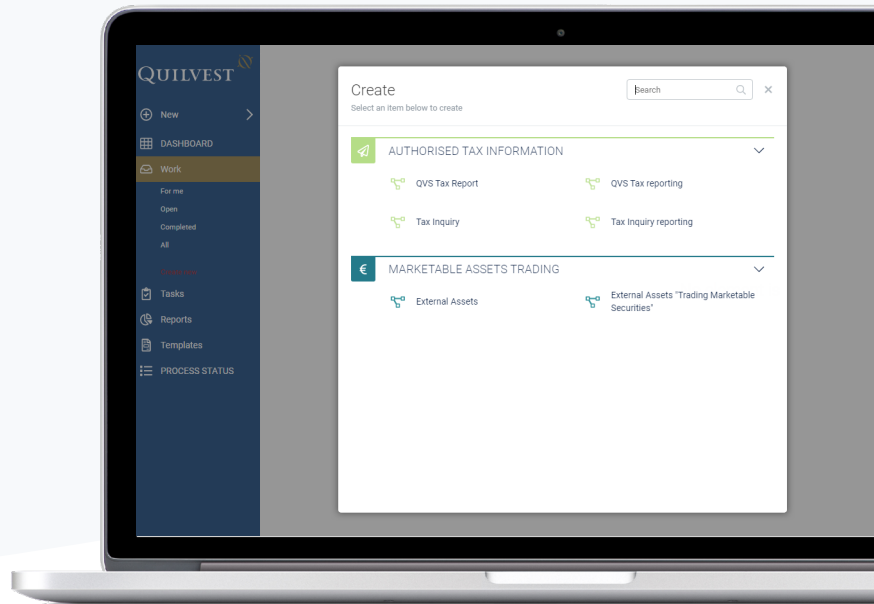
Client account opening process build in Flowable Design.

SUCCESS STORY

These positive effects for monitoring and managing orders will multiply or even potentiate when we digitalize and implement the next set of business processes with Flowable.

Daniel Hirsch

Senior Business Analyst at Quilvest.



Quilvest's end user application in Flowable Work.

Efficient and reliable, both the platform and the team

Kicking off in Spring 2019, the pilot project was implemented within six months. Quilvest's CRM, investment, business analysis and IT departments were involved.

"The cooperation with Flowable was very pleasant, constructive, and productive. The workflow experts were available whenever they were needed on site," says Daniel Hirsch.

"It was a direct and productive collaboration. We did not experience micro-politics or multiple decision-making authorities; we were able to simply implement the concrete requirements," adds Valentin Rentschler, Consultant and Full-Stack Developer at Flowable.

The lean project set-up and reliable support allowed Quilvest to benefit from first results in an early stage and enabled the wealth manager to more efficiency in its business processes.

Next with Flowable: Digitalization of Client Onboarding and Account Opening processes

Quilvest is currently working on further enhancements with Flowable Work: the next processes for digitization and automation are client onboarding and account opening.

"Together with Flowable, we set-up our own individual client profiles and are currently working on a digital identity check feature and a client risk matrix," explains Hirsch the latest developments.

"Theoretically, we can use Flowable to orchestrate any of our processes."

Flowable is a proved platform for mapping finance-specific and individual processes and a leading company in business automation with multiple years of industry expertise.