



# Deal logging and client information tracking system

## The Client

Global Corporate Finance Business Management of a leading global bank

## Industry

Financial Services, Corporate and Investment banking.

## The Business Challenge

Implemented by the Client, the system reflects the continuing goal of providing the tools users need to do business.

Main business challenges are:

- Client information tracking
- Deal logging
- Revenue tracking
- Conflict Management support
- Business and Compliance reporting
- Transaction auditing
- Data exchange (feeds) established with outside systems
- Support custom entitlement rules
- Reduce development and maintenance cost

## The Solution

Starting from 2003, Luxoft development team has been improving the existing system and building up a comprehensive flexible solution to address quickly changing business needs. Luxoft has established proper communication and development processes required for successful execution of the project.

The System serves as the central data repository for GCF's client and deal information and distributes this data to the following consumers:

## Project Facts:

- Functional area  
Deal Management, Overall Client Relationship Management, Conflict Management and Data feeds functions
- Technology set  
Oracle, J2EE, EJB, JDBC, Struts/JSP/Servlet, WebLogic, Sun LDAP, BRIO Portal, Web Services
- Integration  
BRIO, Paragon, FXRates, etc
- User profile  
Front office, Global Corporate Finance Division. The current global user community is comprised of Deal Loggers, Control Room Compliance Officers, Controlling and Company Administrators.
- Number of users  
Over 400 users in Americas, Europe and Asia
- Relationships status  
Ongoing ODC; quarterly releases; T&M basis
- Services provided  
Business analysis, development, maintenance, production and development support, QA
- Team size  
10 team members
- Duration  
4+ years



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- Global Banking CRM solution
- Controllers
- Electronic Document Management Systems
- Research
- Control Room Portal
- Business Planning and Development reporting tool

Luxoft has built highly available and scalable solution that meets ambitious goals set by the bank. The application is currently used in all bank locations across Americas, Europe and Asia. The system is currently being used by over 400 users.

## The Benefits

- Improved functionality, flexibility and performance in comparison with its legacy predecessor
- Improved user experience through intuitive user interface and navigation
- Substantial effort saving due to process automation, such as feeds running, automated reporting, etc.
- Major cost savings realized as a result of moving to modern system architecture with state-of-the-art technologies.
- 30-40% estimated development cost reduction due to outsourcing to Luxoft

### Luxoft World Headquarters

10-3, 1-Volokolamsky proezd  
123060 Moscow, Russia  
Tel: +7 (495) 967-8030  
Toll free: +1 (888) 458-9638  
info@luxoft.com