

### Customized Collaboration Solution Increases Efficiency and Improves Customer Support



**“Whether they are sitting next to each other or working in offices separated by thousands of miles, our sales teams and analysts are able to work much more cohesively, quickly, and effectively, ensuring maximum success for our investor clients.”**

*Peter Culvert,  
IT Manager, Redburn Partners*

#### About MindLink

MindLink is the only purpose-built Business Critical Collaboration platform that allows teams to coordinate and exchange vital business information rapidly across the business.

MindLink is designed to help people work together faster and smarter, so they can make critical business decisions more effectively.

MindLink can be fully integrated into existing process and software applications. It is used by clients, including some of the largest global financial institutions, to enable better communications and improve team efficiency.

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**Redburn implemented a customized intelligent collaboration solution from MindLink combining Microsoft OCS, Dynamics CRM and SharePoint to create a seamless, integrated experience.**

Redburn Partners LLP is a UK based independent institutional equities broker founded in 2003. It provides institutional investors with stock recommendations, sales trading and execution, industrial analysis, research, and reporting services as well as corporate and strategic access, linking investors to its network of industry executives and independent experts. With more than 1400 clients it has offices in the UK and US.

#### The scene

As one of the largest independent pan-European institutional equities brokers, Redburn Partners has a complex technology infrastructure. However, as is the case with most growing organizations, the more Redburn expanded its software systems, the more disjointed the technology infrastructure actually became. This prevented the company from operating as efficiently as it would have liked.

#### The need

The company's customers, which include major Wall Street investment banks, rely on Redburn to provide up-to-the-minute stock information and industry news. Redburn employees had access to various applications to help them provide clients with information and pursue new business opportunities. These included a Fidessa order management system, a MindAlign Group Chat solution and a Microsoft Dynamics CRM solution. Each of these systems operated separately, making gathering and communicating information time-consuming and inefficient. Users had to log on and off each application separately in order to search and retrieve the necessary information.

Peter Culver, IT Manager, Redburn Partners, explains, “The applications were adequate, but our sales staff and analysts didn’t have access to one seamless solution that offered a complete picture of a customer or industry, so it was difficult to provide customers with accurate market trends in a timely manner. Also, this lack of integration made the flow of information between the sales and analysts teams ineffective.”

To address its business challenges, Redburn wanted to move to a more cohesive environment that could integrate the organization’s different applications and support changing requirements moving forward.

#### The answer

Redburn decided to implement a customized solution from MindLink. “We already had a long-standing relationship with MindLink so we knew that they could provide good, workable solutions in a timely manner,” says Culver. “MindLink understood the strategic motivations in the development work and was keen to enhance our processes.”

At the heart of the implementation was the migration from MindAlign to Microsoft OCS Group Chat to enhance communications. The MindLink solution gives employees a complete picture of all information relating to a customer through automatically taking customer sales information from the order management system and publishing it into OCS Group Chat. Previously, this data was shared manually by the traders who are the company's most time-pressured staff.

MindLink has also integrated MindLink WebChat, and OCS Instant Messaging and Group Chat web access solution, with Microsoft Dynamics CRM and Microsoft SharePoint in order to ensure that the solutions are fully optimized. For example, from OCS Group Chat, workers can launch or view discussions within the WebChat application or click a link that goes directly to the specific customer's profile in Microsoft Dynamics CRM. They can click a link to visit a customer site in SharePoint that includes an RSS feed, updated industry news stories, and the customer's sales history. WebChat has also added integrity to Office SharePoint. "Having WebChat was identified early on as a true enabler in securing user buy-in" says Culver. "Without it, we really felt that we would have been scraping the surface of what Office SharePoint is capable of."

**"MindLink WebChat integration of Microsoft OCS into SharePoint is critical for us. SharePoint is a central technology for us, yet, the solution would not be complete without WebChat."**

**Peter Culver**  
IT Manager, Redburn Partner

## The outcome

**"MindLink has had a massive, positive impact on our business, so much so that we are on target for the implementation to achieve full return on investment in less than 18 months."**

**Peter Culver**  
IT Manager, Redburn Partner

The MindLink solution helps Redburn integrate key business processes, so teams can share ideas and information much easier than before. Redburn has also increased revenue and realized a full return on its investment.

Globally dispersed teams can quickly and easily create and share Group Chat discussions about customers, ensuring that all parties, regardless of where they are located, have access to the same knowledge to share with customers. All discussions are recorded for historical knowledge and legal purposes.

Easier access to current customer data and financial information has helped the sales teams provide real-time responses to questions that come up on calls. As a result, Redburn has seen a boost in revenue which will help drive the business forward.

MindLink has helped our teams share ideas and information like never before," says Culver. "For example, if a salesperson is on a call with a customer wondering about a stock, they can now open a chat room backed by dozens of other Redburn professionals, including analysts, to discuss the latest market data. Salespeople can use Microsoft Dynamics CRM to view all recent trades that the customer made or to read the day's stock news in the RSS feed in SharePoint. Also, by disseminating the information from the order management system, our teams are better informed, which promotes cross-selling."

## MindLink benefits

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| <b>Increased Revenue</b>             | Faster response times of sales teams due to easier access to relevant data and improved intelligence on stocks             |
| <b>Integrated Business Processes</b> | No disruptions or inefficiencies due to 'log on/ log off' into separate systems  |
| <b>Improved Cross Selling</b>        | Better informed sales teams with seamless access to data from all systems can identify more cross and upsell opportunities |
| <b>Better Knowledge Management</b>   | Collective knowledge of employees can be shared to make work more cohesive and effective                                   |



**MindLink Software**  
Business Critical Collaboration

[www.mindlinksoft.com](http://www.mindlinksoft.com)