



**“We needed a collaboration platform that was accessible in the office & on the go, offered superior integration with our existing systems and met stringent compliance requirements – MindLink came highly recommended”**

Simon Bailey,  
Director, Head of IT&Operations  
Numis Securities

### About MindLink

MindLink is a highly secure Chat Enabled Collaboration (CEC) platform built specifically for enterprises. Think of us as a secure alternative to WhatsApp™, designed for business use.

MindLink's messaging & collaboration app encourages employees to stay connected, reduce Email usage and build a more agile business. It provides mobility, security, compliance and advanced integration whilst connecting to UC platforms such as Microsoft Lync & Skype for Business.

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## **Numis Securities Uses MindLink's Enterprise Chat Application to improve cross-team collaboration in the office and on the move.**

Numis Securities replaced its legacy communication system with enterprise chat solution from MindLink, providing the investment bank with increased flexibility, improved communication and tight process integration across the business.

Founded in 2000, Numis Securities Ltd. is an independent investment banking and institutional stockbroking company, and trading subsidiary of Numis Corporation Plc., whose shares are quoted on the London Stock Exchange.

The firm, which provides a premium integrated investment banking service to corporate and institutional clients, is headquartered in London. The company's 176 employees provide a range of capabilities (research, institutional sales, market making, corporate broking and corporate finance) across 15 different market sectors focussed on UK equities.

### The scene

Competition amongst mid-sized brokerage firms is fierce. To succeed, a firm needs a highly specialised workforce and the tools & technology that allows them to access real-time market updates, industry news and internal data, and collaborate easily across teams. Compliance mandates require the enterprise to record certain conversations, making it critical that any communication & collaboration platform meets stringent regulations.

### The need

To gain a competitive edge, Numis was in need of a platform that would allow real-time critical collaboration across the company, especially between teams such as trading, sales, research and corporate broking.

The platform would need to be flexible and have an interface that is familiar to the user to encourage adoption. Enabling remote access was crucial - catering for users on the go, as was the need for fully-fledged integration with existing systems e.g. CRM, Outlook etc.

Simon Bailey, Director and Head of IT and Operations outlines the rationale: “The nature of our business requires a sophisticated collaboration strategy; and persistent group chat functionality is a key enabler to achieve this. Replacing our incumbent product with an agile and intelligent platform is a great investment for our business enabling us to provide a better service to our clients.”

### The Answer

Numis needed to firstly move away from its legacy platform (effectively an end-of-life product which became much harder and more expensive to support after being moved into maintenance only mode by the product owner). By doing so, it could reduce on-going maintenance costs and improve flexibility. Numis made the decision to implement Microsoft Lync as the underlying platform, but needed a strong and purpose-built tool for enterprise chat to add to it. MindLink led the migration onto the new Microsoft Lync platform, and in addition, provided Numis Securities with several best-in-class collaboration tools.

Patrick Coelho, who manages the infrastructure support team at Numis Securities comments: “There are very few collaboration platforms available that meet the stringent persistent and searchable requirements that we need. MindLink came highly recommended by our peers and following initial

meetings, we could see how their platform would not only meet compliance mandates, but also give our business a real step forward in terms of real-time team collaboration, fast access to critical information and improved decision making.”

**“MindLink is making our business more agile. Feedback from our teams has been extremely positive and we’ve noticed improvements in responsiveness & workflow processes.”**

**Simon Bailey,**  
*Director & Head of IT & Operations*

Last but not least, Numis was won over by the look & feel of the platform and found it intuitive and straightforward to navigate - meaning little training was required and their user base migrated to it very easily.

“In terms of implementation,” Coelho explains, “we implemented MindLink in a big bang fashion across, following a couple of dress rehearsals. MindLink managed the process very efficiently and provided seamless continuity of service.”

## The outcome

Today, all areas and the majority of employees of Numis Securities are using MindLink with user adoption at an unmatched level. The platform proves particularly effective for inter-office communication in the fast moving trading environment. Here are some examples of how Numis uses MindLink:

- Per sector chat channels to discuss focussed research and trading idea.
- Critical discussion channels around new accounts, new deals and to strategize around focus areas
- Mergers & Acquisitions discussions on the news wire - monitoring reactions, sentiment, strategies and targets
- Support channels to offer dealers assistance in case of any impediments to trading
- Risk arbitration chat channels to gain clarification on models, pricing and deal settlements
- Back office communications to carry out end of day reporting for regional offices
- Trading system monitoring & alerts posted to chat rooms for support functions to react and solve any issues

“To put it simply, MindLink are helping our business to become more agile. Feedback on the platform is extremely positive across the teams and the company has noticed big improvements in collaborative information sharing, and workflow processes already, particularly the integration of MindLink and CRM, and the provision of mobile access. The flexibility that the mobile access gives the company – coupled with tight integration with its other tools - means employees and teams are now able to function much faster and more intelligently. This gives us a great competitive edge – and positively impacts the bottom line.

## What’s next?

Numis Securities is continuing to develop its use of MindLink across the business to further improve collaboration across teams and projects – especially in the mobile area. The company is currently evaluating the use of MindLink Tablet for use with their iPad devices.

## MindLink Benefits

<b>Integrated Business Processes</b>	<b>External social data and internal information from CRM and Email allows for better, more informed decision making and collaboration</b>
<b>Lower total cost of ownership</b>	Experienced support teams & low maintenance compared to previous platform
<b>Collaboration ‘on the go’</b>	Information is accessible from anywhere leading to improved productivity & faster decision making
<b>Outstanding Usage Uptake</b>	Intuitive look & feel with familiar design allows for easy navigation & usage
<b>Improved productivity &amp; efficiency</b>	Result of effective real-time team collaboration, increasing revenue potential

**“The MindLink platform, gives us a real step forward in terms of flexibility around remote access and integration with other tools. This will directly impact our bottom line”**

**Patrick Coelho,**  
*Infrastructure Manager*