dp workflow

deep pool
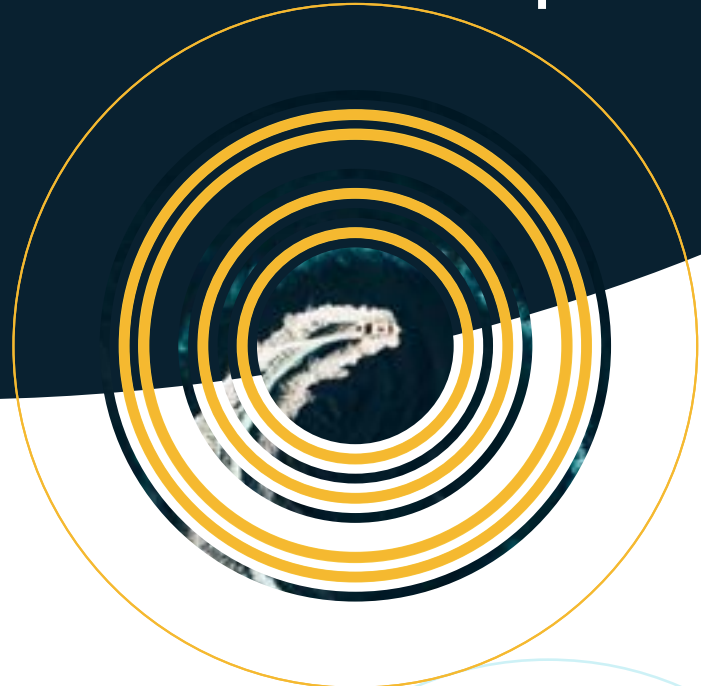
Operations management for optimum performance.

Take control of your business with dpworkflow.

Enhanced operational effectiveness in your hands.

Automate and streamline

dpworkflow is a fully automated solution that gives you scalability and efficiency at a global level. Workflow integrates with your core systems giving you oversight and control.

Management made easy for:

- Client lifecycle
- Operations
- Project management
- Trade order cycle
- MIS/KPI automation
- Document control

dp workflow beneficiaries include:

- Board members
- Outsourcing committees
- Chief operating office
- Chief risk office
- Chief technology office
- Outsourced groups
- Team leads
- Compliance/Risk

Why choose dpworkflow

External system integration	Task allocation	Document management
File capture	Dashboard	KPI/MIS
Client Lifecycle	Trade order management	Process monitoring

Your needs. Our solution.

Integrate seamlessly with your core systems to automate your workflows and processes.

Centrally controlled operating model

Challenge: Global teams working collaboratively face hurdles with transparency and organisation.

dpworkflow solution: dpworkflow's customisable rule engine lends itself to the creation of bespoke processes and implement control. Specific projects can be streamlined and taken to closure. Your SLAs and OLAs can be digitised and embedded within the system. Tasks can be controlled and allocated centrally, allowing you to operate at a global level. Full maker/checker functionality with audit trail embeds a solid framework of operation. MIS and KPI reporting driven from SLA/OLA data mean easy consumption for review and improvement.

User benefit:

Transparency and control driven from the system enable scalability and efficiency at an enterprise level.

Client lifecycle management

Challenge: Management of the entire client lifecycle requires an enterprise approach but is not easily accomplished when disparate systems are involved.

dpworkflow solution: dpworkflow's Integrates with your underlying systems and connects with online platforms to manage a seamless exchange of data. A fully customisable dashboard allows simple and intuitive end-user consumption. The onboarding, due diligence and offboarding processes are fully managed, along with fund setup, valuation and NAV processing, trade processing, payments, and reporting.

User benefit:

Integrated systems provide automation, reducing error and mitigating risk.

Business activity monitoring

Challenge: Time sensitive, automated processes require real-time monitoring applied at scale – easier said than done.

dpworkflow solution: dpworkflow's flexible notification framework for real-time events, changes/updates, processing steps and scheduled tasks means comfort for your business. Alerts for suspicious activity, change of circumstances, anti-fraud and investor screening hits mean potential issues can be investigated and resolved before they become actual issues. A single dashboard view simplifies consumption. Communications, both internal and external are tracked centrally.

User benefit:

Complete oversight of your business giving you the confidence that it is running at its best.

Trade capture

Challenge: Trade capture from external sources brings complexities for automation and scale.

dpworkflow solution: dpworkflow integrates with your investor services system allowing you to capture trades from various sources. Orders are managed through each stage with approval/rejection controls. Relevant documents are captured. The dashboard view gives transparency of events and status, along with the audit trail of activity.

User benefit:

Centrally manage the trade order function with a full audit track.

Document management

Challenge: The financial services industry relies on a significant level of document exchange which necessitates the need to manage these documents.

dpworkflow solution: dpworkflow automatically reads QR document barcodes. Documents are captured by email, fax, FTP, etc. Version control ensures you are working with the right iteration without losing the history. Splitting/merging of content for optimal result to your business.

User benefit:

Comprehensive document management system giving you the flexibility to centralise all aspects of your processes.

Get in touch
Discover how **dpworkflow** can transform your business.

About Deep Pool

Deep Pool is the #1 investor servicing and compliance solutions supplier, providing cutting-edge software and consulting services to the world's leading fund administrators and asset managers. Our flexible solution suite, developed by an experienced team of accountants, business analysts and software engineers, supports offshore and onshore hedge funds, partnerships, private equity vehicles, retail funds and regulated financial firms. Deep Pool is a global organisation with offices in Dublin, Ireland, the United States, the Cayman Islands and Slovakia. For more information, visit: www.deep-pool.com.

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