

— Orchestrator

Efficient financial operations
with business process modelling



bravura
solutions

Financial software solutions that deliver.

CONTENTS

03	BRAVURA'S ORCHESTRATOR
04	KEY BENEFITS
05	TECHNICAL FEATURES
08	INTEGRATING WITH PLATFORMS
09	ORCHESTRATOR IN ACTION
10	BOOK A DEMO



MEET ORCHESTRATOR

BRAVURA'S LEADING SOLUTION FOR KEEPING PROCESSES AND OPERATIONS IN TOTAL HARMONY

In the race to improve efficiencies, cut costs and meet increasing client expectations, the financial services industry is undergoing a monumental transformation.

With segregated processes and operations remaining a stubborn obstacle when adapting to constantly changing regulatory environments, Bravura's Orchestrator automates time-consuming administrative tasks to help tame complexity.

Whether you're a pensions provider, wealth platform or transfer agent, Orchestrator gives you the building blocks to support, simplify and turbo-charge business operations.



Our client achieved

59%

reduction in manual
processing time.

WHAT IS ORCHESTRATOR?

Orchestrator is a Business Process Model and Notation (BPMN) compliant automation tool that is tailored to financial industry needs. It enables organisations to build, execute and manage complex administrative processes to improve efficiencies and reduce costs.

PROACTIVE, EFFICIENT AND CAPABLE

By measuring the performance of your firm's processes against pre-defined business goals and letting you refine these over time, Orchestrator opens up a world of opportunities.

Its powerful modelling technology empowers a financial organisation to customise its use of any platform to become super nimble in adapting to ever-changing business demands to achieve repeatable, cost-effective and game-changing outcomes.

Whatever processes your business uses, Orchestrator goes the extra mile to deliver value, consistently.



KEY BENEFITS

DELIVERING OPERATIONAL EFFICIENCIES

01 REDUCE YOUR COSTS

Reduce costs, increase operational capacity and improve accuracy by automating manual and repetitive tasks.



02 INCREASE PRODUCTIVITY

Build better working dynamics, improved transparency and more effective team collaboration through a flexible digital interface.



03 PROMOTE CONTINUOUS IMPROVEMENT

Identify inefficiencies and wastage by comparing end-to-end processes to expected results at operation and business levels.



04 MANAGE AUDIT CONTROL

React quickly and effectively to regulatory or legislative change by integrating the compliance function via Orchestrator.



05 ENHANCE DIALOGUE WITH CUSTOMERS

Intuitive digital services enable fast and consistent communication between clients and providers.

TECHNICAL FEATURES

ORCHESTRATOR'S TALENTS
IN A SNAPSHOT



**PROCESS
DESIGN**



**DIGITAL
INTERFACE**



**WORK
MANAGEMENT**



**INTEGRATION
AND DATA**



**INFORMATION
AND INSIGHT**

TECHNICAL FEATURES

ORCHESTRATOR'S TALENTS IN A SNAPSHOT

PROCESS DESIGN

Orchestrator supports the standard Business Process Modelling (BPMN 2.0) notation which is commonly used to design, model and execute business processes.

This provides an easily understandable methodology that enables an organisation to quickly identify core processes and reusable components to automate processes.

Orchestrator comes with a library of templates and actions that provide building blocks to support, simplify and turbo-charge business processes. It is managed entirely from within Orchestrator with no requirement to deploy code.

DIGITAL INTERFACE

Orchestrator provides the ability to support teams, ensuring that they have the relevant information and data at hand to perform required tasks.

Featuring a uniquely configurable interface, Orchestrator enables people to see the full details of their tasks as well as other items' progress and completion.

When handling a specific work item, the interface provides quick access to information about previous comments, documents and other open cases in relation to the client in question.

This interface can be then enhanced with customisable screens for the display of data from other systems, to-do lists and connections to other external screens and applications.

INTEGRATION AND DATA

Orchestrator is super flexible – it can be integrated into various platforms to create, update and locate individual work items.

Orchestrator also manages outbound customer correspondence. Its built-in email functionality automates a broader range of communications, enabling a more consistent experience with clients.

WORK MANAGEMENT

Orchestrator equips organisations with the ability to manage the way their people perform tasks and activities – across the board.

Orchestrator allows for work items to be delivered to a relevant team's "queue" to ensure that all its members have full visibility of the workload and expectations at the start of the day.

Individual work items can also be assigned to specific individuals, giving team leaders control over the allocation process. If there is a need to identify whether an individual has the capacity to complete the task, work can be assigned using algorithms. Orchestrator can also accommodate long-term ownership of items for managing special cases.

The number of items, their priority and importance can all be used to automatically allocate tasks and drive the process forward. A combination of these methods can help ensure that work is completed in line with the order and priority requirements set out by the organisation.

Team leaders will also benefit from real-time configurable dashboards to help inform their operational decisions, track the progress of work items, and assess performance in the context of SLAs and targets.

INFORMATION AND INSIGHT

With real-time operational reports that can be used by management to track performance at team and department levels, Orchestrator maintains process data and records with exceptional transparency.

This information can also be integrated with other business metrics such as funds, performance and more to identify bottlenecks and process pain points to generate future business improvements.

INTEGRATING WITH SONATA AND OTHER CORE PLATFORMS

ORCHESTRATOR INTEGRATES WITH ANY EXISTING PLATFORM ARCHITECTURE, AND WORKS EXCEPTIONALLY WELL IN TANDEM WITH BRAVURA'S SONATA.



Equivalent functionality to commercially available BPMN applications



Direct access to core Sonata data does not require initial integration and data reconciliation



Maximising the value of your investment in Sonata



Understanding of Sonata entities, such as Clients, Accounts, Brokers, Advisers, Transactions, etc.



Single, consolidated architecture for ease of use and cost-efficiency

<input type="checkbox"/>	Business Domain		Count	Age	Rework	STP	Day 0	Day 1	Day 2	Day 3	Day 4+	Day 20+	Day 40+
<input type="checkbox"/>	Dealing		3	1.0	0	0	2	0	0	1	0	0	0
<input type="checkbox"/>	Fund Administrator 2		3	1.0	0	0	2	0	0	1	0	0	0
<input type="checkbox"/>	Transfer In		3	1.0	0	0	2	0	0	1	0	0	0
<input type="checkbox"/>	Servicing		4	1.3	0	0	2	1	0	0	1	0	0
<input type="checkbox"/>	Fund Administrator 1		2	2.0	0	0	1	0	0	0	1	0	0
<input type="checkbox"/>	Stock Transfers		2	2.0	0	0	1	0	0	0	1	0	0
<input type="checkbox"/>	Fund Administrator 2		2	0.5	0	0	1	1	0	0	0	0	0
<input type="checkbox"/>	Change Personal Details		2	0.5	0	0	1	1	0	0	0	0	0

ORCHESTRATOR IN ACTION

USE CASES

NEW BUSINESS

- Implement processes in different ways, from account activation to communication with the clients and payment authorisation/processing. Clients can also upload documents as part of the workflow.

TRANSFERS IN AND OUT

- Follow the path of both automated and manual tasks including chasing ceding providers, completing cases and managing the transfer state. Transactions are tracked end-to-end.

PENSION BENEFIT REQUESTS

- Manage pension benefit requests, both simple and complex. Simplify their common path to reduce manual input and capture time.

CORPORATE ACTIONS

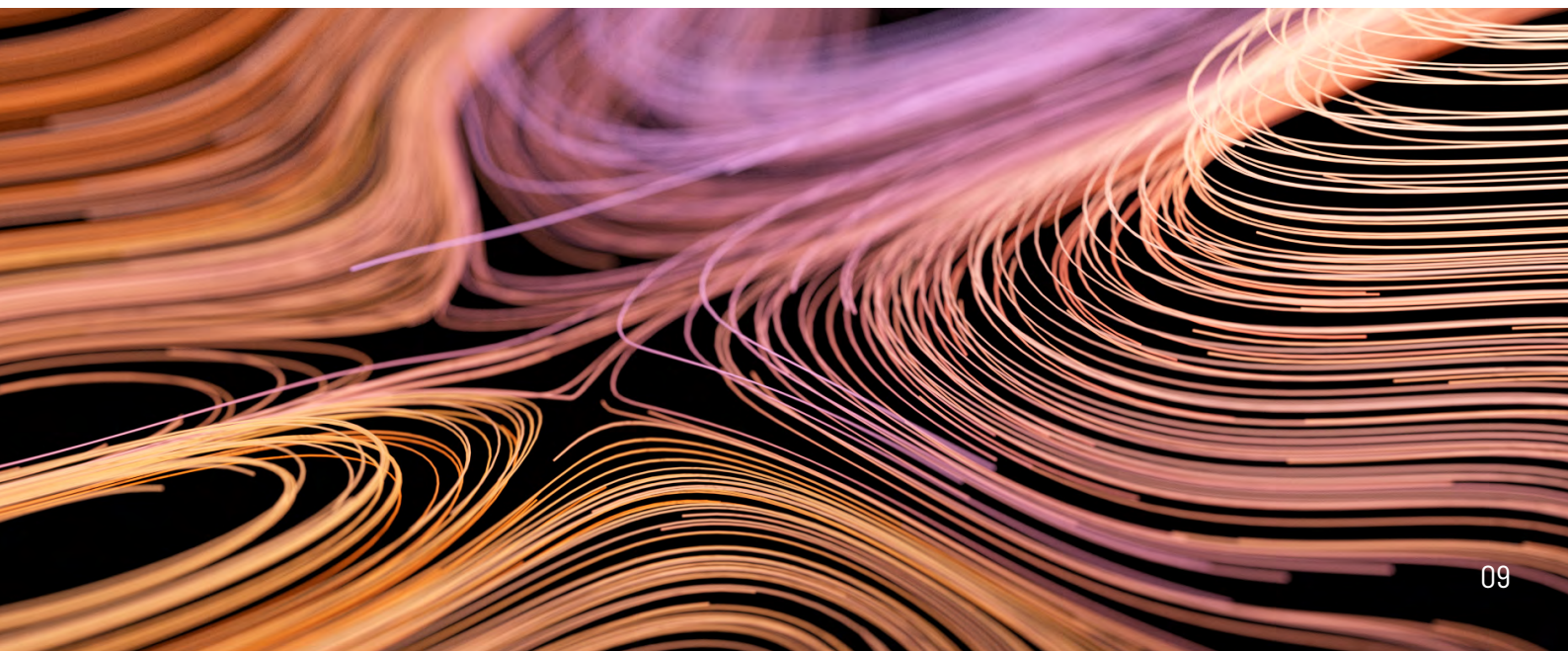
- Automate key parts of the process including pre-entitlement processing and quality checking to make manually intensive steps easier.

DEATHS OR ACCOUNT CLOSURES

- Reduce costs through the implementation of workflows, from assessing claims to cancelling regular payments and sending correspondence.

...MORE

- Design sophisticated processes made up of a series of assignments that are tailored to your specific operational and business needs.





BOOK A DEMO

WITH OUR EXPERT TEAM



We can walk you and your colleagues through how Orchestrator works.

Simply contactus@bravurasolutions.com



ABOUT BRAVURA

At Bravura, software is at the heart of everything we do. We develop innovative technology solutions that power the world's leading financial institutions. We are driven by our corporate purpose – together we create technology that reshapes how organisations and people prosper.

We do this by developing innovative cutting-edge software solutions that become the vital engine powering businesses across the wealth management, pensions and funds administration sectors.

With over 30 years of experience our next generation software solutions help clients increase operational and cost efficiency, enhance their ability to innovate and grow, and minimise their risk, as well as enable them to provide an enhanced level of customer service. Our ever-expanding team across Australia, New Zealand, United Kingdom, Europe, Africa, India and Asia, supports a rapidly growing client base.

Using our global scale and local expertise, combined with our innovative modern technology, Bravura helps power and transform the world's leading financial services businesses, today and for the future.



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