

Case study

Clearwater Capital Partners takes global information management to the next level



HP WorkSite for comprehensive document management

Industry

Financial services

Objective

Improve network performance to streamline information access and sharing across the global organization; standardize and automate currently inconsistent, ad hoc profiling; and rein in large volumes of unmanaged email content to prevent email overload, enable centralized management, and decrease risk.

Approach

Implemented a complete solution based on HP WorkSite document management to enable automated profiling to improve organization and search; version control to capture the complete evolution of investment models; comprehensive security and auditability to reduce risk; and reduced latency through content caching.

IT matters

- HP WorkSite document management
- HP WorkSite Communication Server
- Integration with Microsoft Outlook

Business matters

- Remote access and caching capabilities enable professionals to benefit from centralized firm knowledge while avoiding excessive latency
- Automated profiling improves search and navigation for efficient access
- HP WorkSite Communication Server and Outlook integration give users an easy way to distribute and correctly file email-based content within the familiar flow of work

CLEARWATER
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Improving information access and sharing

As an investment management firm specializing in Asian debt and equity, Clearwater Capital Partners' success depends on its ability to share and manage large volumes of information effectively throughout its distributed global organization. Until recently, remote access challenges made this difficult to achieve. The firm was unable to gain fast, convenient access to trading documentation residing in their New York and Singapore hubs, professionals in satellite offices were retaining and storing critical information on their laptops, which prevented global access and process automation and introduced business continuity risks—all issues that were creating an unacceptable trend.

"Information is a key firm asset, and needs to be centrally managed and controlled," explains Bruno Beuque, Partner at Clearwater Capital Partners. "And on an IT level, data duplication and volume inflation in multiple locations was threatening the firm's ability to deliver a meaningful business continuity plan."

While Citrix remote access software had helped Clearwater Capital Partners improve connectivity for professionals in remote locations, it lacked the granular security, access rights control, version control, and synchronization needed to maintain full control over its information.

Facing these challenges, the firm sought to upgrade its information infrastructure to provide robust document management (DM) functionality throughout the distributed enterprise. "As a trading organization, our firm is quite flexible and entrepreneurial, and we needed a system that could match that flexibility," says Beuque. "HP provided the solution we were looking for."

Supporting the extended enterprise

Clearwater Capital Partners worked with HP partner **SPECTRA IT Associates** to implement a complete solution based on HP WorkSite document management. Comprehensive functionality includes automated profiling to improve organization and search; version control to capture the complete evolution of investment models; comprehensive security and auditability to reduce risk; and reduced latency through content caching. Microsoft Outlook integration gives people a convenient way to move content between their in-box and the WorkSite DM system, relieving the strain on the firm's Exchange server while reducing email overload. The HP WorkSite Communication Server also automates the filing and distribution of email content.

In addition to managing volumes of investment information, Clearwater Capital Partners uses WorkSite to better manage corporate secretarial documentation for its various fund vehicles and management companies. "Keeping track of the articles of incorporation of these companies, their board resolutions, changes in directorship, and other corporate secretarial content can become overwhelming. WorkSite gave us the granular access rights and security to set up workspaces to serve the management of all these companies."

Providing flexible options for organizing and locating content

Clearwater Capital Partners analysts can now easily create investment workspaces with pre-defined folders for trading documentation, financials, due diligence reports, correspondence, and other content. Items dragged and dropped into a folder

“We needed a solution to take us to the next level of size and performance. HP has provided the control, automation, and performance to leverage information effectively throughout our global organization. The improved productivity we have achieved to date is only the beginning.”

— Bruno Beuque, Partner, Clearwater Capital Partners

About Clearwater Capital Partners, LLC

Clearwater Capital Partners, LLC, an investment firm founded in December 2001, invests in special situations and distressed or otherwise undervalued assets and securities located in Asia, excluding Japan. Clearwater's investors include major endowments, foundations, family offices, and large institutions. The firm has offices located in New York, Beijing Hanoi, Hong Kong, Mumbai, Munich, Seoul, and Singapore.

About SPECTRA IT Associates, LLP

SPECTRA IT Associates, a Singapore-based firm, specializes in consulting on and implementation of Enterprise Content Management (ECM) and Business Process Management (BPM) solutions, with specific expertise in HP WorkSite. To learn more, please visit spectra-ita.com.



are automatically assigned the appropriate metadata, aiding search while eliminating the inefficiency and errors of manual profiling.

SPECTRA IT Associates' folder design complements HP's advanced search capabilities with a traditional browsable common tree structure. “We wanted to give our professionals the option of navigating through a Microsoft Explorer-style tree,” says Beuque. “Now they can find things whichever way they feel most comfortable.”

Eliminating email overload

HP WorkSite's integration with Outlook was a key factor in Clearwater Capital Partners' selection of WorkSite, for a number of reasons. The WorkSite Communication Server reduces email overload and streamlines email-based workflows. The numerous investment price quotes sent to management by the firm's brokers can easily add up to more than 100 per day, leading to analyst in-boxes bloated with thousands of substantively valuable emails. Now, brokers simply send the documents to an addressable folder dedicated to the broker, and linked notifications are automatically sent by WorkSite to the subscribed recipients internally.

To reduce the risk of losing business-critical content in an individual inbox, the WorkSite Communication Server eliminates the need for manual filing. The investment workspace structure also has email addressable correspondence folders, in addition to other standard folders such as Trade, Assets, and Presentations.

The WorkSite Communication Server makes it simple for people to securely distribute information about a particular investment to everyone involved in its management, while reducing risk by preventing access by anyone else,” says Beuque. Some third-party financial institutions post documents to IntraLinks, a virtual data room platform. To ensure support, SPECTRA IT Associates enabled Clearwater

Capital Partners to automatically download and file relevant documents from IntraLinks into WorkSite in a timely manner upon receipt of email notifications from IntraLinks. At the same time, a notification is sent to the appropriate users alerting them of the download.

Key benefits of working with HP WorkSite

- Granular security, access rights control, version control, and synchronization to maintain full control over the firm's information.
- Pre-set workspace templates and automated profiling ensure consistent organization and ease of search.
- A customized utility based on HP WorkSite Server with Caching reduces latency by pre-loading servers in satellite offices with documents for better performance.
- HP WorkSite Communication Server auto-files incoming and outgoing emails into addressable workspaces, reducing email overload and ensuring that relevant parties receive complete information about the investments they are managing.

Reaping the benefits of a next-generation solution

HP has helped Clearwater Capital Partners build the robust global architecture it needed to support its growing business. “We needed a solution to take us to the next level of size and performance,” said Beuque. “HP WorkSite has provided the control, automation, and performance to leverage information effectively throughout our global organization. The improved productivity we have achieved to date is only the beginning.”

Learn more at

<http://autonomy.com/products/worksite>

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