

Document Locator®

Case Study > Nephila Capital Ltd



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Simon Storey
CTO
Nephila Capital



Connecting with customers on a bigger scale.

According to Bermuda folklore, the silk spider, Nephila clavipes, can predict bad weather. It spins its web high in the trees in fair weather—and close to the ground during the approach of a hurricane.

For Bermuda-based Nephila Capital, predicting and planning for the future is just as instinctive. However, the firm needed a new approach to serve a growing client base. That’s where ColumbiaSoft’s Document Locator came in.

A perfect storm.

Nephila Capital is a leading investment manager specializing in insurance-linked securities (ILS). They focus on the reinsurance industry with multiple investment products dedicated to investing in insurance-linked securities, catastrophe bonds, insurance swaps, and weather derivatives.

The investments Nephila make on behalf of its clients have evolved over time, along with investors’ risk appetite. The company currently manages multiple investment vehicles and accounts exclusively for sophisticated institutional investors.

While Nephila’s assets and standing were already strong, to expand their business and maintain their strategic advantage, they needed a technical solution.

A self-service delivery model.

Understanding that a large part of growth is extending existing connections, Nephila uses Document Locator to scale its operations, providing a delivery channel that allows self-service retrieval of investor documents from anywhere in the world.

“Document Locator helps us as we scale, allowing us to make great gains toward efficiency,” says Simon Storey, Nephila Capital’s CTO. “Before, we emailed everything to investors. Now, we use a self-service delivery model in conjunction with Document Locator’s workflow capabilities.”

Customer: Nephila Capital Ltd.

Industry: Financial Services

Web Site: www.nephilacapital.com

Critical Issue

A growing financial services firm needs to scale and address its clients’ needs for information access.

Solution

Self-service access and flexible publishing with Document Locator.

Software and Services

Document Locator

Email Management with Email Archive

WebView Remote Access

WebTools Remote Access

Nephila's investor clients can now retrieve information anytime they want using a web browser. Everything is secure; only clients with matching credentials have access to their information. All reports, research papers and statements are handled electronically via a secure portal in a self-service manner.

Saving steps and time in the office.

Managing information internally, and approving it for release, is now much easier. Workflow, approvals, and internal alerts help Nephila staff organize the production and authorization of materials.

"Internally it's much easier for people to promote content to be published – it's not an IT function anymore," adds Storey. "The business users themselves are managing the content, reviewing it and publishing directly to the secure portal."

This efficient approach has streamlined the publication of materials. According to Storey, "The process has gone from days-long to same-day. Plus, we can now do this ahead of time and approve documents to be released and expired on a pre-determined schedule."

More internal productivity gains.

Document Locator has helped Nephila Capital serve more than its investors; it has also become a large part of the company's internal operations.

For example, auditors can use Document Locator to access documents instead of Nephila having to make copies or having the materials leave the premises. When Nephila's traveling sales staff needs to access files, rather than taking documents with them, they just access the material via the Web. This saves time and increases productivity.

Additionally, Nephila uses Document Locator in their accounting and back-office management of files: everything, including paperless automated invoice processing, procedures surrounding expenses, contracts and maintenance agreements are all made easier with the system. Search is an invaluable function also. Staff members use the profile fields within Document Locator to run searches by various criteria, including vendor, time and date.

Value in reporting.

Nephila's use of Document Locator extends the value of the firm's knowledge, making documents useful in ways beyond just the content on their pages.

"We're increasing the usefulness of documents, not just by adding profile information, or by using custom searches," added Storey. "The real value comes in reporting."

Having visibility and control over the firm's vast warehouse of files and processes has many benefits. Disaster recovery, access control, and versioning all add up to gains in productivity and reduced risk of information being lost.

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