



SUCCESS STORY FOR FINANCIAL SERVICES

## Global Financial Services Company

This financial services company uses Kofax Kapow™ to provide research analysts with quick and easy access to the web content they use to inform forecasts, stock recommendations and research for clients all over the world. With faster, fuller insight into complex markets and business situations, analysts can deliver timely, highly accurate information to clients—helping them make smarter decisions and strengthening the company’s reputation as a trusted provider of financial advice and expertise.

### Challenge

Corporate, institutional and private wealth management clients from around the world come to this company for trusted economic forecasts, investment strategy and insights. When the firm investigates a new investment topic or prepares a report for a client, its analysts frequently turn to the web to gather much of the information needed to inform their research and analysis.

However, accessing certain data assets and understanding them in the correct context proved to be a complicated and time-consuming process. For instance, when research involves international companies and markets where English is not the primary language, teams often need to translate local-language content. Relying on machine translations created the risk of information being misinterpreted, requiring teams to devote large amounts of time to cross-checking and validating information.

A spokesperson explained: “We wanted to make it quicker and easier for analysts to gather web-based content and pull it together to create a full picture of a given research topic. We also sought a way to improve our localization capabilities, to ensure that the data used to inform research retained its original meaning and context. This would strengthen the quality and accuracy of our analyses and save valuable time for our teams.”



*This financial services company provides wealth management, asset management and investment banking services for private, corporate and institutional clients worldwide.*

### Products in Use:

- ◆ Kofax Kapow™

**Focus:** Data integration, web data extraction, process automation

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Spokesperson, Global financial services company

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## Solution

The company bolstered its data-gathering efforts with Kofax Kapow, using the solution to automate and streamline the extraction, transformation and delivery of web-based content.

Analysts take advantage of Kapow to inform a variety of research outputs, including stock recommendations, which are compiled based on publicly available financial and operational data from individual companies. The company also uses the insight to publish customized reports, used by institutional investors to solve critical problems such as retail pricing discrepancies, inventory concerns and demographic analysis by store locations.

Whatever the output, the high level of automation delivered by Kapow has dramatically simplified and accelerated the process of pulling custom data assets—in both unstructured and structured formats—from the web and delivering the information in a way that provides end users with a complete picture.

The spokesperson gave an example: “As Kofax Kapow interprets the entire structure of a website, including underlying HTML and JavaScript markup, users can give graphical images a value, thereby providing helpful structure to previously unstructured data. According to our research team, this level of complexity and precision is absent from any other solution currently available in the marketplace.”

Another useful differentiator with Kapow is its unique browser emulator feature. As many websites are optimized for specific web browsers, attempting to access data on different sites with the same browser can lead to significant problems such as incomplete or improperly formatted data. Kapow’s browser emulator automatically mimics the browser in which a specific site performs best, minimizing the occurrence of errors and restrictions.

In addition, the powerful data transformation qualities offered by Kapow have proved to be a crucial advantage, since the team needs to not only access data, but also manipulate, transform and structure it according to specific business rules. These capabilities are proving to be particularly useful for teams working with foreign-language content.

The spokesperson said: “Kofax Kapow easily adapts to local languages during the data and content transformation process, producing an accurate, holistic picture of complicated global markets and business situations to help drive more-informed analysis.”

## Results

The company has empowered its entire research department with easy access to data combined with greater control over that data.

The spokesperson explained: “Kofax Kapow enables analysts to manage data access and extraction for complex research projects at an order of magnitude more efficiently than other methods. As workload efficiency has dramatically increased, the team can easily scale up to take on more projects, all while maintaining the high levels of quality, flexibility and control that our business demands.”

With Kofax Kapow enabling analysts to gather a richer set of data and providing sophisticated transformation capabilities for manipulating that data, the company can deliver much more comprehensive reports that are adapted to the unique needs of each and every client in terms of content and format.

“Kapow revolutionized the way we supply our research team with information, delivering unprecedented accuracy and data quality,” noted the spokesperson. “In doing so, it greatly enhanced team members’ efficiency and ability to deliver greater value to our customers.”

Analysts can easily bring together data from a myriad of sources to more fully answer critical investment questions. And, importantly, Kapow allows users to access the data in its original storage source, meaning that there is no need for the company to build new and expensive data storage systems or expose proprietary and sensitive data to a third-party vendor. All of this helps the firm run more efficiently—reducing costs—and eliminates potential intellectual property issues—cutting risk.

Today, research teams can compile and deliver reports and other analyses faster than ever before. By improving the timeliness and quality of information delivered to clients, the company helps them drive smarter decisions.

The spokesperson concluded: “In the past, it could take many weeks of work to prepare a single report for a client; today, teams can turn the same reports around in a single week. Delivering timelier insights to clients equips them with the information they need to make the most of new opportunities. As a result, they can run more competitive and profitable businesses—and their success strengthens our reputation as a trusted provider of financial advice and expertise.”



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