

Taskize Smart Directory™

The Smart Directory™ is the underlying algorithm which Taskize uses to route your query to the most relevant person at the counterparty organisation.

- Finds people based on what they do, not who they are.
- Provides easy navigation of unfamiliar organisations.
- Learns about your organisation for future routing rules.

Benefits include:

- Provides a standardized way to navigate the entire industry and assign work across operations.
- Self-learning directory allocates work based on the functions that staff perform.
- Smart Directory supports a follow-the-sun model for 24-hour client support capability.
- Allocation algorithm continually learns each user's experience based off their ongoing activity.



When trying to resolve an operations exception with another firm, it is well understood that if you can quickly find the right person with the right knowledge then, together, you can start resolving the problem faster. The challenge is how to find the best person when they are in different firms, different countries and in large teams dealing with hundreds of breaks on a daily basis.

The Taskize Smart Directory™ resolves this problem by quickly finding the right person, in the right role, in the right firm using an allocation algorithm that assigns work directly to an individual in another firm or department. Just enter the firm and the role you are looking for and the Taskize Smart Directory™ will use this information, together with attributes of the problem and Taskize knowledge about the chosen organisation, to find the most suitable person to help resolve your issue.

What's more, the same, simple approach can be used for navigating any of your clients, counterparties, service providers or outsourcers irrespective of how often you talk to them or how well you know their teams. Taskize takes care of knowing these organisations so you don't have to.

Example use case

Looking for the best person in your custodian to solve a settlement break:

- Most operations teams have group email addresses for inbound queries e.g., settlements@bank.com.
- Everyone in the email group receives a copy of the email and they self-select to answer the question. This has been proven to be an inefficient way to allocate work.
- Even worse, when one person answers they 'copy in' the group address causing a proliferation of unwanted emails.
- The Taskize Smart Directory™ resolves this by allocating work to the most appropriate person based off their skill and the attributes of the problem. The algorithm also looks at workload and secondary skills before making a decision.
- Team members can be invited to join bubbles but only on a need-to basis when help is required.
- Management maintain oversight and can move additional resources into the bubble if required e.g., on absence, sickness, escalation.
- And everything is audited so it's easy to see who was asked to what and exactly when they did it.
- Connect Taskize to legacy systems to add the ability to work across counterparties.

About Taskize

Taskize Limited is trusted by over 450 financial firms in 75+ countries making it the leading provider of inter-company workflow to the Financial Services Industry.

Taskize streamlines costly counterparty workflows across buy-sides, sell-sides, custodians, market infrastructures and Fintech providers, without risking data sovereignty. Founded by industry veterans with a record of open innovation, Taskize eliminates the inefficiency and insecurity of email, phone, and chat to provide everything needed to resolve operational issues securely and efficiently. Taskize is cloud-native, with an open architecture and bank-friendly terms leading to easy adoption and benefit realisation.

Taskize is part of the Euroclear group, a leading global provider of Financial Market Infrastructure services.

Works with:

