

TASKIZE AT A GLANCE

Taskize puts you in control of your interactions with clients, counterparties and colleagues.

- Gain a consolidated and real-time view of issues across all parties
- Navigate unfamiliar organisations with the Taskize Smart Directory™
- Manage emails effectively with the Taskize email solution
- Seamlessly interact with other technologies
- Allocate work and track outcomes

Taskize is a cloud solution built to the needs of the financial services industry, live for over 450 financial services institutions in 75+ countries.

EFFICIENCY

Proven to improve resolution times and increase operator productivity.

Replaces email in business workflows.

Gets business under control and improves manageability.

SERVICE

Enables management and enhancement of service levels for key client/counterparty relationships.

Establishes a uniform engagement model for dealing with clients and counterparties.

ECOSYSTEM

System agnostic, Taskize works alongside existing platforms and processes, and can be running in a week.

A browser application which can be easily integrated with your existing technology assets.

COMPLIANCE

Provides a transparent, discoverable and auditable view of interactions to meet reporting obligations.

Proactively enables preparation for regulatory change, e.g. CSDR, UMR.

RISK

Reduces exposure, counterparty and reputational risk.

Enables tracking and management of KPI's.

Taskize Smart Directory™

Navigate the industry quickly

- Consistent navigation of clients, colleagues and counterparties.
- Finds the right people by what they do rather than who they are.
- Automatically learns the jobs people do.

Taskize Email Solution

Access your entire network

- Processes all incoming and outgoing email, making it easy to assign, track and manage.
- Enables all inter-company workflows to be managed in Taskize.

Taskize Bubble™

Inter-company working

- Secure, micro-workspaces where counterparties can resolve issues together.
- Supports clear responsibility and issue ownership
- Easily passed within and across teams and geographies.

Taskize Bubble Blotter™

Prioritise and manage work

- Provides a view of all open issues, allowing prioritisation for and workload management.
- Management oversight of team issues with the ability to delegate, substitute and escalate.

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 for easy adoption and benefit realisation.

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

WORKS WITH

