TASKIZE

MAKE WORK FLOW

TASKIZE PUTS YOU IN CONTROL OF YOUR ENGAGMENT WITH CLIENTS, COUNTERPARTIES AND COLLEAGUES:

- Navigate unfamiliar organisations with Taskize Smart Directory™
- Manage emails effectively
- Gain a consolidated real-time view of issues across parties
- Allocate work and track outcomes
- Connect easily to other technologies
- Address CSDR penalty appeals

Taskize is a Cloud solution built to the needs of the financial services industry, live for over 450 financial services institutions in 50+ countries.

BENEFITS

Efficiency	Service	Risk	Compliance	Ecosystem
Proven to improve resolution times and increase operator productivity. Replaces email in business workflows. Gets business under control and improves manageability.	Enables management and enhancement of service levels for key client/ counterparty relationships. Establishes a uniform engagement model for dealing with clients and counterparties.	Reduces exposure, settlement, counterparty and reputational risk. Enables tracking and management of KPI's.	Provides a transparent, discoverable and auditable view of interactions to meet reporting obligations. Proactively enables preparation for regulatory change, e.g. CSDR, UMR.	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.

WORKS WITH

DTCC   DUCO   euroclear

EZOPS   FINBOURNE LIBERATE / SIMPLIFY / CONNECT   M   S

Taskize Smart DirectoryTM
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 BubbleTM
Inter-company Working

Secure, micro-workspaces where counterparties can resolve issues together.

Supports clear responsibility and issue ownership which can be easily passed within and across teams and geographies.

Taskize Bubble BlotterTM
Prioritise and manage work

Provides view of all open issues, allowing prioritisation and workload management.

Management oversight of team issues with ability to delegate, substitute and escalate.

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 workflow to be managed in Taskize.

ABOUT TASKIZE

Taskize Limited is trusted by over 450 financial firms in 50+ 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.