1. Incorporate Additional Data Sets

- CRM
- Market data
- POS data

2. Invest in Artificial Intelligence

- NLP / NLG
  - Chat integration
- ChatBot
  - Virtual assistant, powered by rules & artificial intelligence, that humans can interact using an Omni-channel interface
  - "Hi Alexa, who covers PIMCO?" "Hello, let me get that for you"
- Social Science
  - An interdisciplinary field about scientific processes and systems to extract knowledge or insights from data in various forms
  - Predictive & prescriptive analytics
  - "Intraday trade idea. Trade alerts to analysts, sales & trading"

3. Monetize the data

- Upgrade User Interface
- Maximize Sales Efficiency
- Improve Client Experience
- Modernize e-Tools
- Utilize Client Analytics
What is SalesBook? / sales hub

2013 - 2017

500+ Global Users
Core cross-asset trading system

eTades, Inquiries, Executed Trades, Missed Trades, Market Data, Sales Feedback, Client Holdings, New Issue, etc...
2018
Simplify Deployment
Interoperability

RFQ Ticket
Derivatives Ticket
Order Ticket
Bulk Ticket Creator

Stuart Eastwood
Kim Prado

SpringBoard

2018
2018
Simplify Deployment
Interoperability
2018
Time
Simplify Deployment
Interoperability
2018
Time
Simplify Deployment
Interoperability

RFQ Ticket
Derivatives Ticket
Order Ticket
Bulk Ticket Creator
Feedback Ticket

Stuart Eastwood
Alerter & Chat

Kim Prado

SalesBook / sales assemble

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IOI

Time
Simplify Deployment
Interoperability
2019 Creating the RBC Ecosystem: Workflow efficiency through Internal Interoperability
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Please note: False Client Data, for display purposes only
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Smart Chat - Interoperability
Smart Ticket - Chat Workflow
Client Intelligence - Interoperability
Client Insight / interoperability

2019 Creating the RBC Ecosystem:
Workflow efficiency through an integrated community

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2019 Leveraging Open Source Perspective
2019 Leveraging Open Source

Perspective
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We believe in the power of creative thinking to define brands and connect with people through meaningful experiences, delivering change and transformation.

Thank you.