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What was the opportunity presented?

The Regulatory Division of Bourse de Montréal Inc. (the “Division”), wanted to digitize many of its processes related to participant requests and centralize the information related to its regulatory activities for greater efficiency.

The process/solution that was in place before:

- Validations were mostly done manually
- Limited visibility from participants on their requests and which state of approval it was at
- Process for file exchange between participants and the Division was not standardized

How has AZUR Group been able to provide a solution?

To provide a solution, AZUR Group assisted the Division in refining and documenting the requirements of the target solution. The requirement gathering was done through workshops between AZUR Group’s team (business analysts, solution architect) and the Division’s SME.

AZUR Group implemented the Salesforce platform for the Division and digitized different processes through:

- Development of a participant portal
- Online forms for various participant requests
- Implementation of a chatter for exchange between participants and the Division
- Integration of DocuSign permitting electronic signatures

From a technical point of view, the difficulty level was “medium” since the Salesforce platform offered most of the functionalities needed for the implementation.

The complexity of the project resided mostly in capturing all the requirements of the processes/forms to digitize as the processes were reviewed during the definition of the requirements.

What was the technology used?

- Salesforce platform
- Salesforce Community - Today, approximately 500 Customer Community Plus Login Licenses are being used
- DocuSign

DocuSign



What were the results?

The project met its goal by providing:

- Online forms for participants regarding most of their request managed by the Division
- Online access by the participants to their regulatory information
- A central point of information for most of the processes of the Division
- A standardized secure file exchange process between participants and the Division

Testimonial

The Regulatory Division of Bourse de Montréal Inc.'s team, has been working with AZUR Group over the last two years. AZUR Group Salesforce expertise, technical know-how as well as their proactivity in offering valuable consultative advice have positively contributed to our appreciation of doing business with them as a trusted technology ally.

The Regulatory Division's Information Management System project along with its community portal allow all historical and current participants' information to be accessible online by various individuals based to their permission access level. This highly secure, adaptable, and scalable foundation could potentially be integrated into other internal applications or tools, allowing additional workflows.



Contact us if you want to learn more