

# Professional Services

**Accelerate your time to value with custom development solutions**



**The open Symphony platform enables you to build bots and custom workflows to enhance your Symphony experience and configure it to your companies specific needs.**

**Lack an in-house development team?  
Have a team overloaded with other projects,  
or that lack expertise in specific areas?**

Whatever the scenario we can help extend your resources to create and support custom Symphony developments from proof-of-concept to mature products that add value to your Symphony implementation.

## On-demand Development Resources

Innovate quickly and at low cost, without disrupting BAU

Leverage our vast in-house expertise to quickly turn-around quality deliveries in a cost-effective manner. Unlike an in-house team who may be unfamiliar with our technology, you can skip the ramp-up time we'll use the latest Symphony technology available.

### Innovate to overcome internal restrictions

You may currently be restricted from enabling certain Symphony features or functionality (such as external access) due to complex internal requirements. We can build custom workflows to unlock core functionality for employees that will accelerate Symphony adoption.

### Speed-up business request delivery

Multiple stakeholders have creative ideas to engage clients with external bots. Help the business provide better client service, differentiated experiences, and stickier engagement.

## What We Offer

### New Developments

#### Proofs-of-concept

From the simple to the complex we can design and build bot prototypes that can be used to build internal buy-in.

#### Production

Let us build, test, and deliver PoC bots to production.

#### Hosting and support

We can reliably host, support, and maintain bots for you on our stable infrastructure.

### Existing Development

We can review things that have already been developed and assess where our involvement could lead to UX, performance, and functionality enhancements.



### One-offs, projects, or ongoing support

Our Professional Services model is flexible to allow you to use us on a one-off build, on a project basis, or for ongoing development support whenever you need it.

Once we've captured your business requirements, needs, and aims we'll provide a proposal including estimated engineering days, duration, and provide the detailed technical architecture install and design documentation you need.

## Case Studies

### #1 Build a script: Content export parsing for Symantec Data Loss Prevention

#### Problem & Requirements

Customer was blocked from enabling users with external communication access because Compliance wanted the Symphony content export ingested to their Symantec Data Loss Prevention (which required email files to contain messages sent by a single internal user only). Separately, the Dealer surveillance team also wanted to monitor all conversations of a given list of dealers.

#### Symphony Custom Solution

We developed a python based parser that took email files, parsed and de-threaded them then applied logic to determine which conversations went to which surveillance systems.

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### #2 Consult and build a bot: Sales and trading workflow PoC bot

#### Problem & Requirements

Customer wanted to move several sales and trading workflows currently handled over emails/calls/multiple systems/off-line-processing to the Symphony platform. The in-house development team were tied up but the business wanted to get moving fast.

#### Symphony Custom Solution

We developed a PoC python bot and then educated and supported the in-house development with its production follow-on, showing them how to take the framework and extend it internally, manage security and implement the front end experience.

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### #3 Build, host and maintain: Exchange Venue OTC Negotiator

#### Problem & Requirements

Customer wanted to bring OTC trading onto their platform and estimate 70% of the market could be brought online. To do so they required a chatbot to negotiate between counterparties and send details to the exchange directly via their own API platform.

#### Symphony Custom Solution

We developed a PoC java bot to support the expected workflows and test / integrate with the exchange venue API appropriately. We also build out a production-ready environment to host the bot for live activity with 24/7 monitoring and first-level support via email.

## Get started now

Contact your Symphony account manager, or get in touch at [PS@symphony.com](mailto:PS@symphony.com) to learn how our Professional Services can help accelerate your time to value with Symphony.

### About Symphony

Symphony is a secure, scalable collaboration platform built specifically for financial services to meet their precise needs for data security and compliance, open architecture, and real-time cross-company communication. We've established the world's largest, and most trusted financial services collaboration community. This human network combined with automation and integrations provides market participants with a common, standardized connection across people, systems, and information to bridge and accelerate workflows between them. We're building solutions to common industry and specific market problems across the enterprise and financial transaction workflows, and innovative ways to engage and service clients securely.