

JBWere

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Challenge

In the financial services industry, instant access to the best information is critical. In a sea of data, being able to easily pinpoint a specific file, phrase or statistic can mean the difference between business success and failure. JBWere needed to create an easy to use search capability that would work across all their important online interfaces. In addition, the business wanted to create a secure service that would enable their institutional clients to access the firm's research and analysis.

Solution

Faster queries, improved customer satisfaction

JBWere implemented Perceptive Search from Lexmark, across a broad range of areas. The firm's intranet uses Workgroup Search to power the search facility of its public Internet site. JBWere also uses the technology across many SQL databases, as it is far quicker to make a query with this technology—to look up a stock code, for example—than to follow the search parameters of each database.

John Brand, project leader for internet development at JBWere, also chose Integration Kit to enhance the registered client site, due to the flexibility it offered. Integration Kit allows the powerful Perceptive Search engine to be seamlessly integrated into other applications. Using Integration Kit, combined with the authoring environment, Cold Fusion, JBWere has established the ultimate online service for the stockbroker's larger corporate customers. As this password-protected site is basically an information searching facility rather than a site with a search facility attached, Perceptive Search offered greater customization.

"Perceptive Search is a great tool to add to a website," Brand said. "Integration Kit is the better tool when you want to create a site where the sole function is searching. The document searching is part of the user's realm."

Meet JBWere

JBWere is a preeminent financial services organization that provides a wide range of advisory and wealth management services to a substantial and diversified client base. Their aim is to be the adviser of choice for clients throughout Australasia and, through their financial networks, provide leading capabilities that extend to financial markets globally.

- ▶ **Location:** Australia and New Zealand
- ▶ **Founded:** 1840
- ▶ **Employees:** 450
- ▶ **Offices:** 9

Products in use: Perceptive Search

"Perceptive Search is a great tool to add to a website."

John Brand

Project Leader for Internet Development
JBWere

"We needed to create a transparent interface for the search engine to ensure compatibility with the look and feel of the site. Perceptive Search worked perfectly."

John Brand

Project Leader for Internet Development
JBWere

Results

Providing a better audit trail

Perceptive Search products enabled Brand's team to develop a more comprehensive audit trail. This provides the team at JBWere with the opportunity to review client queries. From this they can establish individual interests and trends to further cater to customer needs. It also allows them to regularly evaluate the service to ensure that clients are getting the best information available.

"We wanted to provide a service for the institutional clients where they could gain access to research and analysis," Brand said.

Maximizing knowledge transfer

A key result of using Perceptive Search technology is a user-friendly, highly intuitive service that maximizes the knowledge transfer to site visitors. Research information is mostly published in HTML and clients, via a password, can access information on investment and financial information for industries, companies and commodities with a wide variety of search methods.

Searches can be done by stock, sector, the analyst, keywords and combinations, and different results can be cross-referenced against each other. Clients entering the site via a password can then save their personal query preferences with re-executable, transposable dates. This provides a tailored, personal aspect to the service.

Read and watch more stories of success from our global customers at www.lexmark.com/success