

## CASE STUDY



www.cibcwm.com

**CHALLENGE**

- To rapidly deliver a weekly investment report to clients' mobile devices.

**SOLUTION**

- A cost-effective XMetaL content creation system that automatically extracts data from templates and converts it to Wireless Markup Language (WML).

**RESULT**

- Distribution to mobile devices without sacrificing content or workflow efficiency
- Automated data extraction and conversion
- Easy-to-use XML authoring and editing capabilities for creating and reusing content
- Rapid Time-to-Market

*"The XMetaL solution is enabling us to reach out to our clients in a way that was never before possible. Previous solutions were too cost prohibitive or complicated to implement."*

Kevin Dalton, Head of Canadian Technology  
Banking CIBC World Markets

## CIBC World Markets

XMetaL® Gives CIBC World Markets the Solutions Needed to Help Compete in a Content-Saturated World

**Profile**

CIBC World Markets, the investment and merchant banking operation of the Canadian Imperial Bank of Commerce, offers a full range of integrated credit and capital market products, securities and brokerage and asset management services to corporate, government, and institutional clients. CIBC World Markets was looking for a solution that would enable it to instantly deliver its Canadian Technology Investment Banking report to clients via their mobile devices. In today's fast moving market, it is necessary to ensure that clients have access to the financial information they need from anywhere at any time.

**Serving Mobile Subscribers**

The weekly report, which was being produced and distributed to subscribers using a traditional word processing application, presented a unique challenge for the investment firm. While this output format satisfied the needs of the majority of CIBC's subscribers, a growing number of clients were requesting access to the report via their mobile devices. The Canadian Technology Investment Banking report, which chronicles market activity during the previous week, contains critical time sensitive information. CIBC had developed a simple and effective report template comprised of a one page brief containing textual, tabular and chart data designed to instantly convey market activity. Originally authored in Microsoft® Word 97 and then published to Portable Document Format (PDF) – both versions of the report were then emailed to over 200 subscribers. It was important that any mobile solution continued to use this same format. "It was extremely important to us that we find a solution that would quickly and easily enable us to deliver this report to our clients," said Kevin Dalton, Head of Canadian Technology Banking at CIBC World Markets. "It was imperative that the information be delivered in real-time."

**Delivering to New Channels with XML**

XMetaL Professional Services created a solution that would enable CIBC to distribute its weekly report to clients via mobile devices without sacrificing content or workflow efficiency. The XMetaL solution focused on extracting data from templates that were used to create the weekly report and storing this data as XML content. Once the data was extracted and XML-enabled, it was converted to Wireless Markup Language (WML), an XML subset used to deliver content and user interfaces to wireless devices. By converting data from the weekly report templates into a format specifically designed for wireless devices, XMetaL was able to ensure that CIBC subscribers using these devices would have quick, easy access to important financial information. "Our clients – particularly for this report – are very technology reliant," explained Kevin Dalton. "We needed a solution that would enable us to instantly connect with them no matter where they are. This XMetaL solution gives us the ability to reach out to our customers in an entirely new way."

## C A S E S T U D Y



### Reaching Beyond the Norm

Using the solution created by XMetaL Professional Services, CIBC analysts can seamlessly transform the Canadian Technology Investment Banking report from a word processor document to a WML file with the click of a button. The reports content is then delivered, via email through CIBC's own server, in the familiar format that the author and the subscribers have grown accustomed to. "The XMetaL solution is enabling us to reach out to our clients in a way that was never before possible. Previous solutions were too cost prohibitive or complicated to implement. Working with XMetaL Professional Services has been an extremely valuable experience—they were exceptionally responsive, client focused and solution driven."

#### JUSTSYSTEMS.

<http://www.justsystems.com>

##### North America:

+1.866.793.1542

[contactsales-na@justsystems.com](mailto:contactsales-na@justsystems.com)

##### Europe:

+44.0.1462.889.082

[contactsales-emea@justsystems.com](mailto:contactsales-emea@justsystems.com)

**International:** +1.604.697.8705

#### About JustSystems

JustSystems is a leading global software provider with three decades of successful innovation in office productivity, information management, and consumer and enterprise software. With over 2,500 customers worldwide, the company is continuing a global expansion strategy based on its xfy enterprise software, XMetaL content lifecycle solutions, and its pioneering work in enabling XBRL financial reporting technologies. JustSystems is one of the 2008 KMWorld 100 Companies that Matter in Knowledge Management, a 2008 EContent 100 member, and was recognized on the 2008 KMWorld Trend-Setting Product list for XMetaL. Major strategic partnerships include IBM, Oracle and EMC.

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