

Quantios

Intelligent software
transforms Ocorian's
client-servicing
experience.

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Spotlight on Ocorian

Founded in Jersey in 1971 as Bedell Trust, Ocorian is an awarding-winning global provider of trust, administration and fiduciary services for companies, institutions, individuals and funds across the world.

In February 2020, Ocorian merged with Estera – another highly regarded provider of corporate, fund and trust services – to create a business of international scale and reputation.

Operating from 20 key locations across the world, the company has the range and reach to deliver all the trust, administration and fiduciary services clients need - wherever with they need them - with the agility and personalised service they expect.

Key Benefits

Implementing NavOne has resulted in the following benefits:

50%

business growth directly attributed to NavOne

x2

planned doubling of user base

12

months estimated elapsed time to fully onboard new acquisitions

Ocorian were utilising a legacy system to provide wealth administration services but were not happy with the functionality it offered.

Moving to Quantios

The vendor support from Quantios not only throughout the migration planning but also through deployment and support was second to none. The not insignificant cost of staying with the current system for the next three years was also of real relevance in the decision to change vendor.

Business Challenges

Ocorian considered all the market leading systems, but NavOne was seen as being by far and away the market leader then, and remains so today. Ocorian were looking for a very clean, efficient and accurate system together

with the capability to achieve a seamless, accurate migration for 110 users across 5 global jurisdictions. An effective administration and accounting system is the core of any trust business, so it was critical that they could move their historic data cleanly and easily.

What were the adoption rates of the new system?

Adoption rates were very high; all staff could immediately relate to the client data, and the organisational associations and record lists, and found it very straightforward to move between the screens – it was very natural for them, and testing was much easier.

“I would give Quantios ‘10 out of 10’ for their service and support during the migration and implementation stages and thereafter. It is not very often a seamless migration like this happens, in my experience. NavOne was streets ahead in terms of functionality, and provided us with ease of integration with other applications, integral workflow and the capability to handle key parts of our evolving business, such as electronic banking payments.”

David Brown

Director of Client Services, Ocorian

“Quantios is transforming the way Ocorian now manages trust operations for clients.”

David Brown

Director of Client Services, Ocorian

“Thanks to Quantios and the hard work of our project team, we now have a highly efficient and secure trust administration system, offering top level capabilities combined with excellent support.”

David Brown

Director of Client Services, Ocorian

How did the new system improve overall workflow and efficiencies?

There was a huge difference using the new platform in terms of business and process controls, workflow and reporting capabilities. The firm was able to introduce full jurisdictional controls and governance in a much easier way by using the underlying roles and permissions structure in the system. The functionality uplift, once moved to Quantios, was welcomed by both users and support staff, allowing integration of key business applications such as Document Management as well as anti-money laundering connectivity.

How has NavOne helped you grow?

The business has grown by 50% since partnering with Quantios, primarily because NavOne enabled integration with many other systems such as Treasury, Document Management, Automated charging and Anti-money laundering capabilities.. Additional features and benefits such as role-based authorization and improved reporting, have further helped grow the client base to almost double its original size.

How does NavOne give a competitive advantage moving forward?

The business has ambitious growth plans including a number of planned acquisitions, so NavOne’s features will be very beneficial to new users and make training far easier.

The menu navigation and ribbon approach, plus the new role centres, make for a more focused, improved user experience across our different departments. With private equity backing the company is primed for rapid expansion and growth, aiming to fully integrate any new acquisitions within the first 12 months from purchase.

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David Brown

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