

Case Study



CLEARWATER  
CAPITAL PARTNERS

 INTERWOVEN®

 **SPECTRA**  
IT Associates LLP



## Clearwater Capital Partners Maximizes Leverage of Global Information Assets with Interwoven

As an investment management firm specializing in Asian debt and equity, Clearwater Capital Partners' success depends on its ability to share and manage large volumes of information effectively throughout its distributed global organization. Until recently, remote access challenges made this difficult to achieve: unable to gain fast, convenient access to trading documentation residing in the firm's New York and Singapore hubs, professionals in satellite offices were retaining and storing critical information on their own laptops, preventing global access and process automation and introducing business continuity risks—an unacceptable trend. "Information is a key firm asset, and needs to be centrally managed and controlled," explains Bruno Beauque, Partner at Clearwater Capital Partners. "And on an IT level, data duplication and volume inflation in multiple locations was threatening the firm's ability to deliver a meaningful business continuity plan."

While Citrix remote access software had helped Clearwater Capital Partners improve connectivity for professionals in remote locations, it lacked the granular security, access rights control, version control, and synchronization needed to maintain full control over its information. The firm sought to upgrade its information infrastructure to provide robust document management (DM) functionality throughout the distributed enterprise. "As a trading organization, our firm is quite flexible and entrepreneurial, and we needed a system that could match that flexibility," says Beauque. "Interwoven provided the solution we were looking for."

*"We needed a solution to take us to the next level of size and performance. Interwoven has provided the control, automation, and performance to leverage information effectively throughout our global organization. The improved productivity we have achieved to date is only the beginning."*

*Bruno Beauque, Partner, Clearwater Capital Partners*

### Supporting the Extended Enterprise.

Clearwater Capital Partners worked with Interwoven partner SPECTRA IT Associates to implement a complete solution based on Interwoven WorkSite document management. Comprehensive functionality includes automated profiling to improve organization and search; version control to capture the complete evolution of investment models; comprehensive security and auditability to reduce risk; and reduced latency through content caching. Microsoft Outlook integration gives people a convenient way to move content between their in-box and the DM system, relieving the strain on its Exchange server while reducing email overload. WorkSite Communication Server automates the filing and distribution of email content.

In addition to managing the voluminous information relating to investments, Clearwater Capital Partners used WorkSite to better manage corporate secretarial documentation for its various fund vehicles and management companies. "Keeping track of the articles of incorporations of these companies, their board resolutions, changes in directorship, and other corporate secretarial content can become overwhelming. WorkSite gave us the granular access rights and security to set up workspaces to serve the management of all these companies."

### Providing Flexible Options for Organizing and Locating Content

Clearwater Capital Partners analysts can now easily create investment workspaces with pre-defined folders for trading documentation, financials, due diligence reports, correspondence, and other content. Items dragged and dropped into a folder are automatically assigned the appropriate metadata, aiding search while eliminating the inefficiency and errors

#### Industry

Financial Services

#### Challenges

- Poor network performance made it difficult to leverage information assets across the globally distributed organization
- Inconsistent, ad hoc profiling made content difficult to find
- Large volumes of unmanaged email content caused email overload, undermined centralized management, and increased risk

#### Benefits of Using Interwoven

- Remote access and caching capabilities enable professionals to benefit from centralized firm knowledge while avoiding excessive latency
- Automated profiling improves search and navigation for efficient access
- WorkSite Communication Server and Outlook integration give users an easy way to distribute and correctly file email-based content within the familiar flow of work



*Clearwater Capital Partners is one of the leading fund managers for Asian Special Situations. It operates from 8 offices mostly across Asia.*

## Solution Overview/Leveraging Global Information n Assets with Interwoven

**Interwoven WorkSite** powers document management for Clearwater Capital Partners' globally distributed organization. The solution provides the granular security, access rights control, version control, and synchronization needed to maintain full control over the firm's information. Pre-set workspace templates and automated profiling ensure consistent organization and ease of search. A customized utility based on WorkSite Server with Caching reduces latency by pre-loading servers in satellite offices with documents for better performance. WorkSite Communication Server auto-files incoming and outgoing emails into addressable workspaces, reducing email overload and ensuring that relevant parties receive complete information about the investments they are managing.

of manual profiling. SPECTRA IT Associates' design complements Interwoven's advanced search capabilities with a traditional browsable common tree structure. "We wanted to give our professionals the option of navigating through a Microsoft Explorer-style tree," says Beauque. "Now they can find things whichever way they feel most comfortable."

### Eliminating Email Overload

Interwoven's integration with Outlook was a key factor in Clearwater Capital Partners' selection of WorkSite. WorkSite Communication Server further reduces email overload and streamlines email-based workflows. The numerous investment price quotes sent to management by the firm's brokers can easily add up to more than 100 per day, leading to analyst in-boxes bloated with thousands of substantively valuable emails. Now, brokers simply send the documents to an addressable folder dedicated to the broker, and linked notifications are automatically sent by Worksite to the subscribed recipients internally. Worksite Communication Server eliminates the need for manual filing while eliminating the risk that these business-critical content will be lost in an individual inbox. The investment workspace structure also has email addressable correspondence folder, in addition to other standard folders such as Trade, Assets, Presentations. "WorkSite Communication Server makes it simple for people to securely distribute information about a particular investment to everyone involved in its management, while reducing risk by preventing access by anyone else," says Beauque.

Some third party financial institutions post documents to IntraLinks, a virtual data room platform. Again working with SPECTRA IT Associates, Clearwater Capital Partners now has relevant documents from IntraLinks automatically downloaded and filed into WorkSite in a timely manner upon receipt of email notifications from IntraLinks, and internally a notification sent to appropriate users.

### Reaping the Benefits of a Next-Generation Solution

Interwoven has helped Clearwater Capital Partners build the robust global architecture it needed to support its growing business. "We needed a solution to take us to the next level of size and performance," said Beauque. "Interwoven has provided the control, automation, and performance to leverage information effectively throughout our global organization. The improved productivity we have achieved to date is only the beginning."

### About Clearwater Capital Partners, LLC

Clearwater Capital Partners, LLC ("Clearwater") is an investment firm founded in December 2001 to invest in special situations and distressed or otherwise undervalued assets and securities located in Asia, excluding Japan. Clearwater's investors include major endowments, foundations, family offices and large institutions. Clearwater is located in New York, Beijing Hanoi, Hong Kong, Mumbai, Munich, Seoul and Singapore. Clearwater's global reach is complimented by its local presence and due diligence and execution capabilities in local currencies, languages and jurisdictions.

### About Interwoven

Interwoven (NASDAQ: IWOV) is a global leader in content management solutions. Interwoven's software and services enable organizations to maximize online business performance and organize, find, and govern business content. To learn more about Interwoven, please visit [www.interwoven.com](http://www.interwoven.com).

### About SPECTRA IT Associates LLP

SPECTRA IT Associates, a Singapore based firm, specializes in consulting on and implementation of Enterprise Content Management (ECM) and Business Process Management (BPM) solutions, with specific expertise in Interwoven WorkSite and Metastorm BPM suites. To learn more, please visit [www.spectra-ita.com](http://www.spectra-ita.com).

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