
CorpNordic[★]

The leading trust and company management service provider in the Nordic countries

About CorpNordic

- ✦ CorpNordic is the leading trust management company in the Nordic/Baltic region
- ✦ In business since 1999 with offices in Copenhagen (~35 pers.) and Stockholm (~12 pers.)
- ✦ Clients are multinationals, international investors and high net worth individuals
- ✦ Our employees are highly educated within accounting, law and finance
- ✦ We render management, administrative, trustee and financial services

CorpNordic[★]

Introducing The Portal

The main purpose of the Portal

- ✦ Share knowledge about our clients
- ✦ Share contacts – clients, advisors, feeders, suppliers
- ✦ Streamline the way we work
- ✦ Make the daily service of clients more easy

Don't worry!

- ✦ We will still use Outlook
- ✦ We will still use Word
- ✦ We will still use Excel
- ✦ We will still use Navision
- ✦ We do have access to all the old files from N:

Be happy!

- ✦ We have updated templates
- ✦ We can follow all correspondence with a client
- ✦ We have a standardized way of filing
- ✦ We have access to all our contacts
- ✦ E-mails can be tracked automatically
- ✦ The development in cases are monitored step by step

Be ready for changes!

✦ Our work set-up will expand with new definitions:

- ✦ Cases ~ What are you working with
- ✦ Tasks ~ What are you doing
- ✦ Roles ~ Relations to the client
- ✦ Classifications ~ The overall filing structure

And we will also have:

- ✦ Companies
- ✦ Business units
- ✦ Clients 😊
- ✦ Contacts

Sample

The Client

XYZ Group ApS
Bladanvej 3, 1st floor
DK-2100 Copenhagen
Client no. 7823

Sample

Roles:

AM Bertil Wogensen

FM Henrik Damm Krogh

MD Søren Søgaard

DB Asterix Olsen, XYZ Group

Auditor Obelix Nielsen, KPMG DK

Other Idéfix Jakobsen, XYZ Group

Other Miraculix Jensen, KPMG CY

Your flexibility and understanding is vital

- ✦ It Is new to all of us
- ✦ The coming weeks will be a learning process
- ✦ We will change the way we work

A good start Monday morning

- ✦ The project team will give you education
- ✦ The project team will support you
- ✦ Exformatics will be present
- ✦ You will get guidelines
- ✦ You will get a manual

And last but not least

✦ You are all very smart

Facts about the solution

- ✦ Exformatics ESDH + BRM
- ✦ >1.000 companies, >2.000 contacts, >80.000 documents, >10.000 cases/year
- ✦ Based on Office System 2007, Exchange 2003, Office SharePoint Server 2007, SQL Server 2005
- ✦ Integration to Navision (to come)

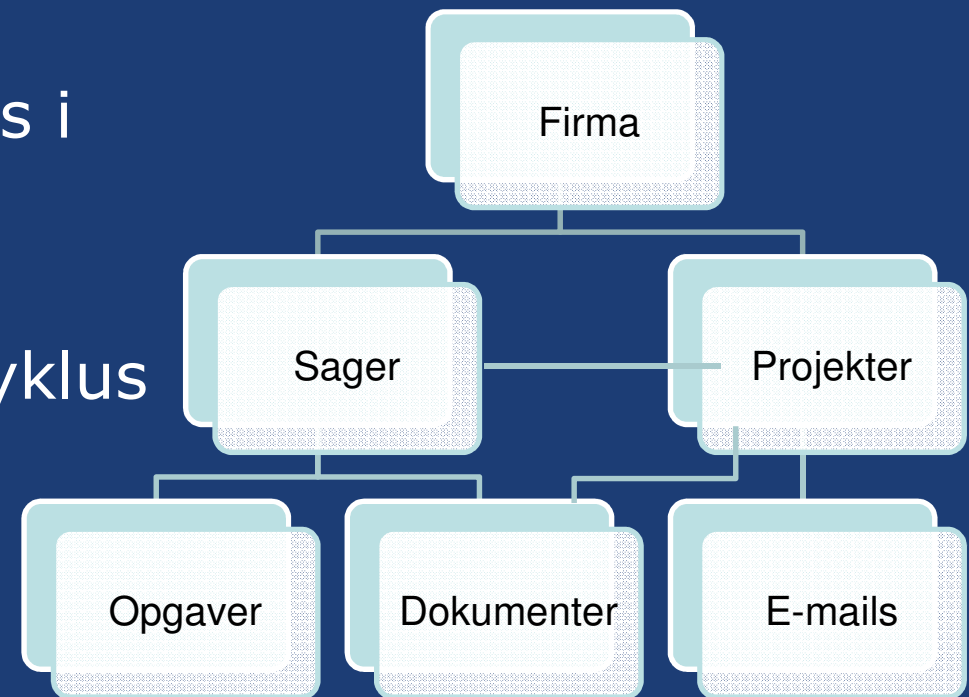
Exformationens 3 Bud

1. Tilbyd overblik og genveje
– ikke nye omveje!
2. Tillad aktiviteter at være unikke
– ikke teknologien!
3. Tilbring 12 uger på vej til målet
– ikke 12 måneder!



Principperne

- Én vidensplatform
- Kendte værktøjer
- Viden fanges og bruges i unikke aktiviteter
- 360° overblik i portal
- Regler for videns livscyklus
- "Structure by design"
- Iterativ udvikling
- GET STARTED



Gevinsterne

- Overblik og deling sparer tid
- Genveje og personalisering gør den enkelte mere effektiv
- Komplet information giver bedre service
- Opgavestyring giver ledelsen større overblik



Hvis viden er din vare, så ...

- ... minimér besvær med at tilføje varer!
- ... styr livscyklus ud fra fælles regler!
- ... gør det let at shoppe viden!
- ... gør forsendelsesprocessen enkel!
- ... lær om tracking fra e-handel!



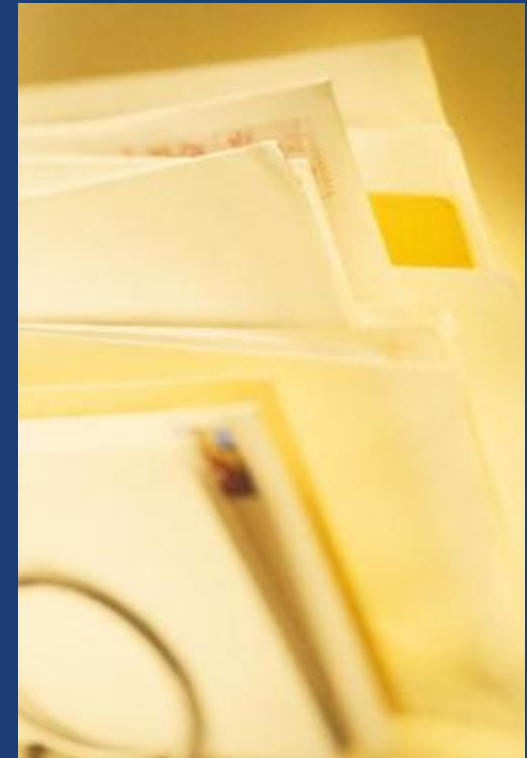
Hvis dine arbejdsgange er vigtige, så ...

- ... identificér systematikken!
- ... gør det enkelt at dele god praksis!
- ... fokusér på fremdrift!
- ... bevar intelligensen!
- ... giv ledelsen overblik!



Hvis dialog med kunder er kritisk, så ...

- ... indfang alt væsentligt!
- ... håndtér alle kanaler!
- ... gør ægte deling mulig!
- ... opfyld lovkrav!
- ... sikr dig, at du kan genfinde!



Exformation hos CorpNordic

Før

- 10.000 manuelt styrede foldere
- 10.000 individuelle opgaver
- 10.000 "CC" mails
- 50 individers metoder



Nu

- Få hundrede styrede relationer
- 20 ensartede tjeklister
- "On demand" indsigt
- Én fælles metode

