As part of its 2009 strategic plan, the Autorité des Marchés Financiers (AMF) embarked on a massive project to redesign its entire website -- both front- and back end -- and overall content delivery. The aim was to deliver better information and training material to the different actors in the financial market: secure information gathering and verification, improve distribution of accurate data, enhance general investor education, and to increase transparency into the role of the AMF in the economic health of the region.

AMF worked with Everteam services and the latest version of everteam.ibpms to integrate a platform for efficiently deploying processes as part of the effort.
About Autorité des Marchés Financiers

The Autorité des Marchés Financiers (AMF), an independent public body, regulates participants and products in France’s financial markets.

The AMF is charged with safeguarding investments in financial products, ensuring that investors receive material information, maintains orderly financial markets. The AMF regulates participants and products on French financial markets, including financial markets and market infrastructures, listed companies, financial intermediaries authorised to provide investment services and financial investment advice (credit institutions authorised to provide investment services, investment firms, investment management companies, financial investment advisers, direct marketers), and collective investment products invested in financial instruments. In addition, it ensures that investors receive material information, and provides a mediation service to assist them in disputes.

The AMF is supported by five Consultative Commissions, each comprising about twenty experts. Their mission is to inform the Board’s decisions on changes to the regulations or the ombudsman’s policies. A Scientific Advisory Board composed of recognised experts from the academic and financial fields supports the AMF’s study and strategic monitoring remit. The AMF reports annually to the President and Parliament.

The Business Challenge

As part of a massive project to redesign its entire website -- both front- and back end -- and overall content delivery, the AMF recognized the need to define a new editorial policy for the development of key content. Content delivery would no longer be the responsibility of the Communications department alone.

However, even as the AMF sought to decentralize content production, they recognized the need to migrate the publication delivery processes from ad-hoc systems (telephone, email, paper) to a fully automated, centralized system, ensuring that the delivery of content would align fully with editorial policy across all published content, and automating tasks where manual interventions were not needed.

To support the complex, multi-actor processes required to meet these needs, the AMF needed comprehensive content management and robust processes to ensure continued availability of accurate documentation to all stakeholders in financial markets, from institutional leaders to private investors.
The AMF needed an open and flexible process management solution that would accommodate the desired decentralized document production with centralized document delivery. The solution also needed to integrate with the other major components of the new architecture, namely a new Content Management System (Magnolia) and the existing document management system (Alfresco).

Requirements

The Everteam Solution

As the complexity of the desired solution became evident, Everteam professional services was brought in to implement the latest version of everteam.ibpms and work with a team of technology vendors to help fully integrate the solution. AMF and Everteam determined they could meet the needs of the institution and the target audiences with content management integrated into the new website and supported by clearly defined business processes embracing each area of the interface.

The portal is more than just an educational resource; it also supports critical functions and processes via simplified data identification and processing. All content management processes such as validation, and publication are handled by everteam.ibpms on the back end and delivered to stakeholders through the portal. Advanced features track publications and mastery of published information by the actors involved.
“The web site redesign project is a substantial project with a large set of requirements and a wide variety of human and technical resources involved. everteam.ibpms has proved to be a critical component as it provided us with a reliable, feature-complete, Enterprise-grade process management platform on the one hand, but also with support and services on the other.”
**Everteam Impact: Critical Data for Financial Markets, On Demand**

On-going delivery of consistent financial and regulatory data is critical to the economic health of entire countries. When so much depends on the right information at the right time and complete processes, technology partnerships are key to a complex project's success. everteam.ibpms and Everteam professional services helped integrate important and highly sensitive tasks. The result was the smooth and successful rollout of a new portal for all stakeholders, and the AMF continuing to meet its charter.

With a complete and dependable solution in place, AMF meets its goals in operations and financial reporting, delivering collective investment products, regulating and monitoring markets and infrastructure, and regulating and monitoring financial services providers.

“We are pleased with the success of this project and congratulate AMF on blazing new trails in transparent functioning of regulatory bodies. With experience built over 15 years helping global companies and government agencies around the world, Everteam products and Everteam services are well positioned to help customers master complex business processes and deliver on a better customer experience.”

Michael McDaid | Everteam
Everteam brings over 25 years’ experience and innovation to the field of Enterprise Content Management. In an ever-increasing legal and compliance environment, Everteam’s range of products support the improvement of content-driven processes, and enable enterprise customers to easily monitor and align their content strategies for overall organizational efficiency and effectiveness.