

B&I Capital

Overview

Business type: **Boutique asset management company**

Location: **Austin, Singapore, Zurich**

Solution: **ClarifyGo recording for Microsoft Teams**

Number of seats: **25**

B&I Capital were looking for a certified Teams recording solution that supported data protection regulations, including MiFID II. Dissatisfied with their existing systems, they wanted a single, no hassle solution that would capture trader calls across their sites in the US, Singapore and Switzerland.

After considering several alternatives on the Microsoft Partner Marketplace and contacting Oak directly, they chose ClarifyGo.

The customer's story

Aldo Tobler, CTO at B&I Capital, explains why ClarifyGo was the right choice for them:

The need for a fully compliant, joined-up solution

We moved to Microsoft Teams direct routing in 2019, not long before the global pandemic, and knew from the beginning that we would have to capture calls securely for compliance purposes, including data protection rules and particularly MiFID II in Europe.

At that time, options were fairly limited, and we ended using two different 'off the shelf' recorders that our landline providers found for each site in Zurich and Singapore. They were essentially on-premises systems, hosted by the local service providers rather than a public cloud, which was hard to maintain and didn't sit comfortably with our desire for transparency around call management and storage.

Therefore, when we opened our new offices in Austin, we decided to look for a solution that would work across all three global sites, comply with local compliance regulations, ideally with secure cloud storage in Microsoft Azure.



B&I Capital

Finding the best solution

We used the Microsoft Marketplace to look at potential vendors and decided to reach out to Oak Innovation directly about their ClarifyGo solution. We're so glad we did.

Oak were very helpful from the start. Account Manager, Will Arnold, oversaw the process, providing a full product demo, ensuring our technical questions were answered promptly, and checking our meticulous legal and compliance team were satisfied.



“It was a great decision to contact Oak directly as the team was so helpful. I got all the technical information that I needed very quickly.”

Why we chose Oak (and would do again)

The process was so simple: on placing the order, we were onboarded in a day and went live within a week. I check in with the system once a month to make sure everything is still running, but we've yet to have any problems. Everything is managed by Oak in Azure, so the maintenance our end is next to nothing, and we know all our recordings are as secure as possible.

Best of all, the system works for all three of our sites, which makes auditing much simpler should regulators require evidence, or should we need to check records in case of disputes or malpractice which fortunately not been a problem we've encountered so far!

In terms of ROI, ClarifyGo offers great value for money, being feature-rich yet affordable as pricing scales with the number of users we have. As a growing asset management business, this suits us so much better than the fixed pricing options that I have come across.