

SYMPHONY

FOR OPERATIONS

KEY USE CASES

1. **Discuss and track projects/ systems/ applications/ change control/ support with relevant team members inside specific team chatrooms.** This reduces complex email flows and makes it easier for project team to handover across shifts. Use @mention to get someone's attention/action and use the mobile app to respond to messages on the go, especially if your colleague is in another region.
2. **Respond rapidly to urgent requests such as trade breaks, urgent client issues, etc.** by setting up special alerts for notifications from senior management or from your Sales & Trading desks
3. **Manage tasks/workstream by tagging chats with specific projects/ priorities/ action items.** E.g. tagging #urgent enables you to see anytime #urgent has been mentioned across your chats and getting first to the ones with #urgent on them
4. **Integrate with third party applications and develop bots to automate operations workflows.** E.g a bot that sends you notifications of system outages, network downtime, etc.
5. **Automatically receive alerts from internal trade processing systems about a trade break,** enabling immediate attention and timely response, **via a Trade Break bot**
6. **Automatically respond to clients' trade enquiries** and let clients subscribe to updates on important trades, **via a trade status management bot**

RECOMMENDED ROOMS

- [Region or Key City] Operations Team (e.g., London Operations Team)
- [Global] Operations Room
- Operations Trade Break Room
- Trade Confirms: S&T / Operations
- EXT: [Client X] / [Firm] Operations Support Room (e.g., EXT: BlackRock/ A Bank Operations Support Room)

RECOMMENDED USER DESKTOP SETUP

- **Text layout:** small font size, condensed info density, and standard 'time ago' format
- **Folder organization:** place chats into critical vs informational folders, and keep external chats foldered separately
- **Workspace:** keep important trade-related and project rooms pinned. Keep external chats on the same side to visually distinguish between internal/external

SYMPHONY

GET STARTED WITH #TAGGING FOR OPERATIONS

#HASHTAGS FOR OPERATIONS

TRADE ACTIVITY/ISSUES

#TradeBreak
#TradeConfirm
#TradeNotSettling
#NonReceipt
#ClientIssue
#TradeUpdate
#TradeBreach
#TradeRequest
#NoFurtherTrading

OPERATIONS MANAGEMENT

#Operations
#Clientissue
#ManagementUpdate

SEVERITY

#Sev1
#Sev2
#Sev3
#Urgent

SALES & TRADING COLLAB

#MissingPaymentInfo
#Client[Name]

REGIONS

#EMEA
#APAC
#AMERICAS
#LATAM

INTERNAL

#Urgent
#QualityControl
#Risk

GENERAL

#ToDo
#ToRead
#ProjectXYZ
#ClientXYZ
#ManagementUpdate