

Cinnamon Reporting

Multi-Channel Client Reporting



How do you combine the requirements of classical Client Reporting with modern Web Reporting?

Your customers expect up-to-date reports on all channels and an individualised reporting experience. Cinnamon offers a lean, integrated solution that produces customisable reports. Just the way your customers want it.

Executive Summary

Cinnamon – Multi-Channel Client Reporting



The requirements for modern client reporting are constantly changing. As a bank, an asset manager, or a family office, the following three aspects are key success factors:



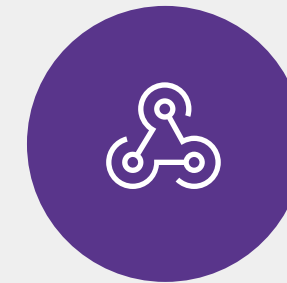
1. Quality and consistency of client reports

Cinnamon produces both web and print (pdf) reports from the same building blocks. The web channel adapts to suit smartphones, tablets, and desktops equally well. You determine the layout and the design according to your branding guidelines.



2. Flexibility to provide an individualised customer experience

Finally, business users can adjust reports! Regardless of whether you want to add or remove building blocks of a report, change the report's logic or the choose a different layout: You can respond to the needs of your customers without requiring an IT release.



3. Efficiency through seamless system integration and workflows

Thanks to state-of-the-art web technologies, Cinnamon seamlessly integrates into your system landscape. Model your reporting process with the help of a workflow tool and thereby increase the efficiency of your operations.

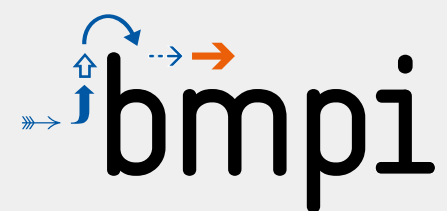
Powerful Client Reporting Solutions

Cinnamon – Multi-Channel Client Reporting

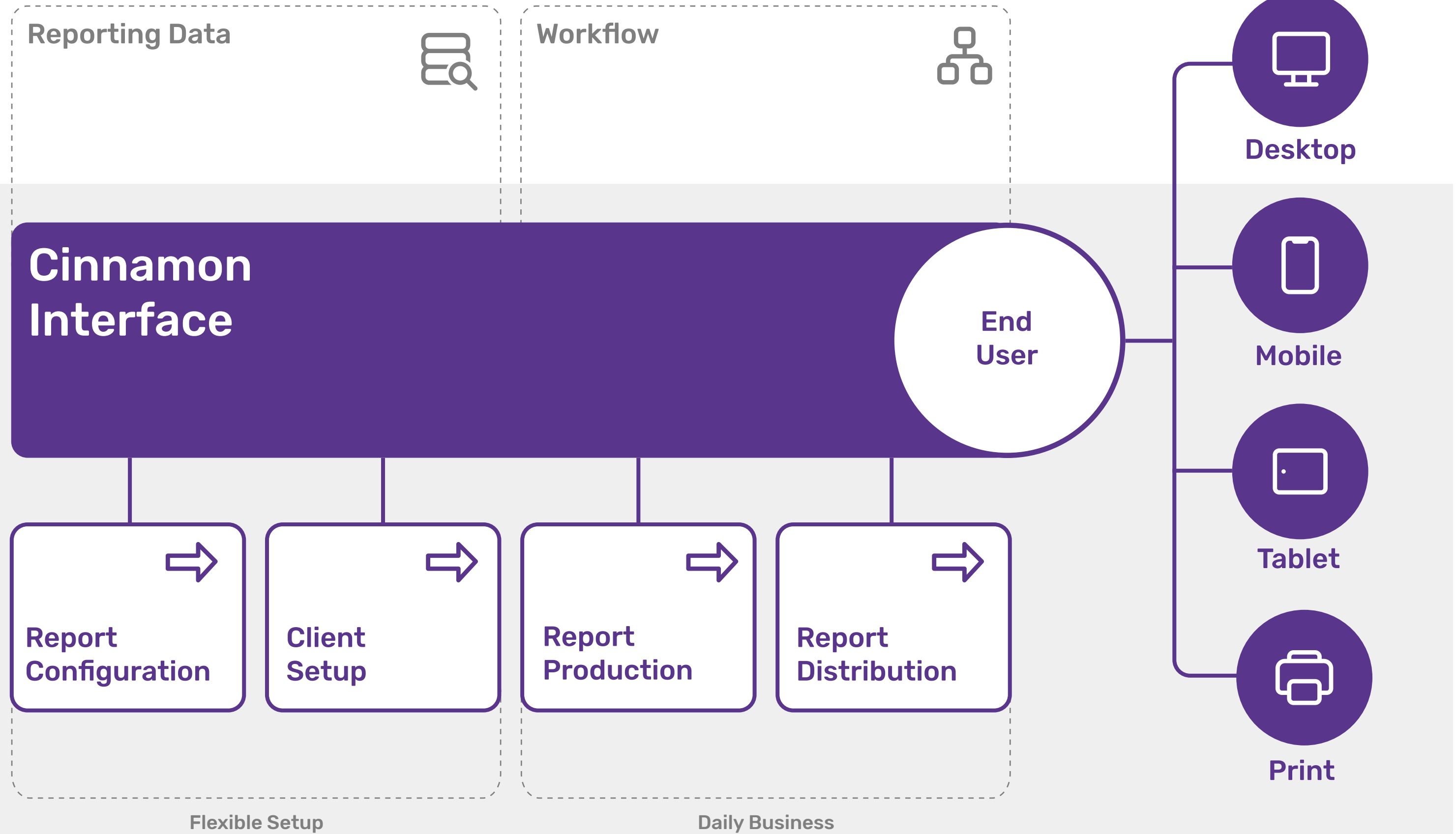


Cinnamon Reporting is currently in use with Wealth and Asset Managers and has proven to fulfil their reporting requirements.

We packaged Cinnamon with our 20 years of experience in client reporting and IT. The needs of large banks, asset managers, and family offices drove the development of the software.



A product of bmpi AG – since 1997 your trusted specialist for investment reporting and advisory processes in the financial sector based in Zurich.



Customer Experience – Consistent Multi-Channel Reports

Cinnamon – Multi-Channel Client Reporting



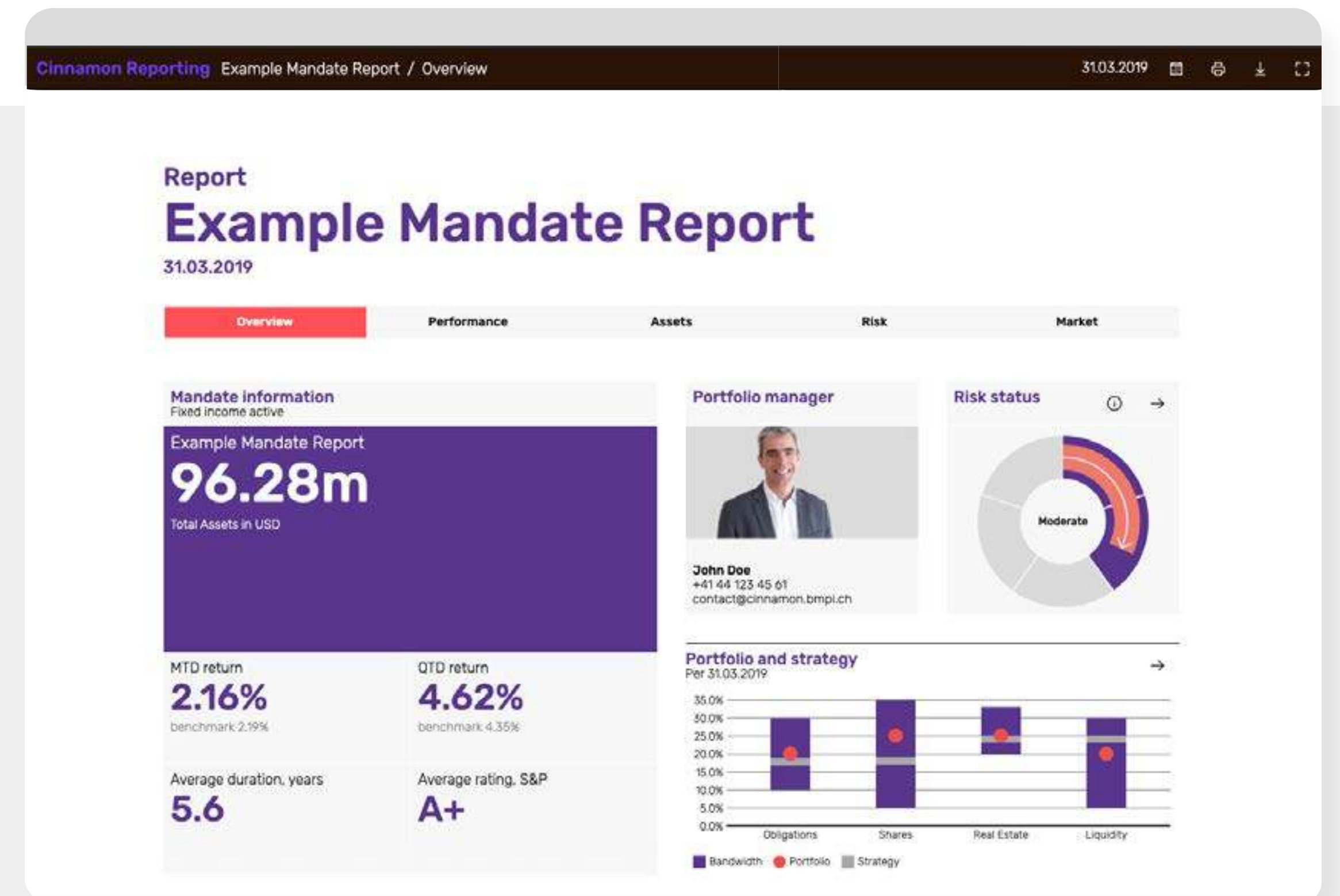
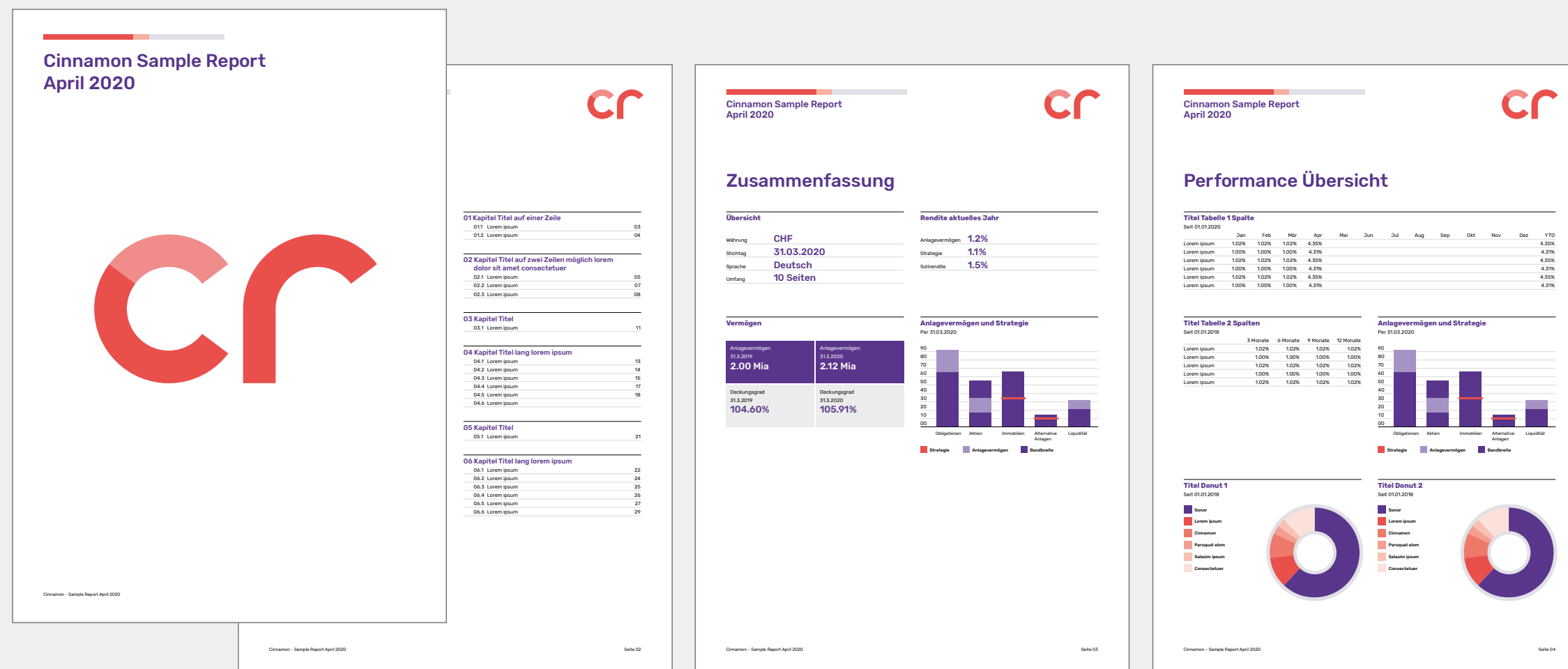
A single data set serves across all channels. This is how Cinnamon creates a consistent, high-quality customer experience.

Web Report

Your reporting becomes interactive – with Cinnamon Web you offer your customers a new reporting experience, optimised and adapted for smartphones, tablets and desktops.

Print Report

Classic reporting in new quality – Cinnamon Print supports all standard reporting formats in Office and PDF. The reports are created according to your design specifications and requirements, just like on the web.



Customer Experience – Perfect Branding

Cinnamon – Multi-Channel Client Reporting

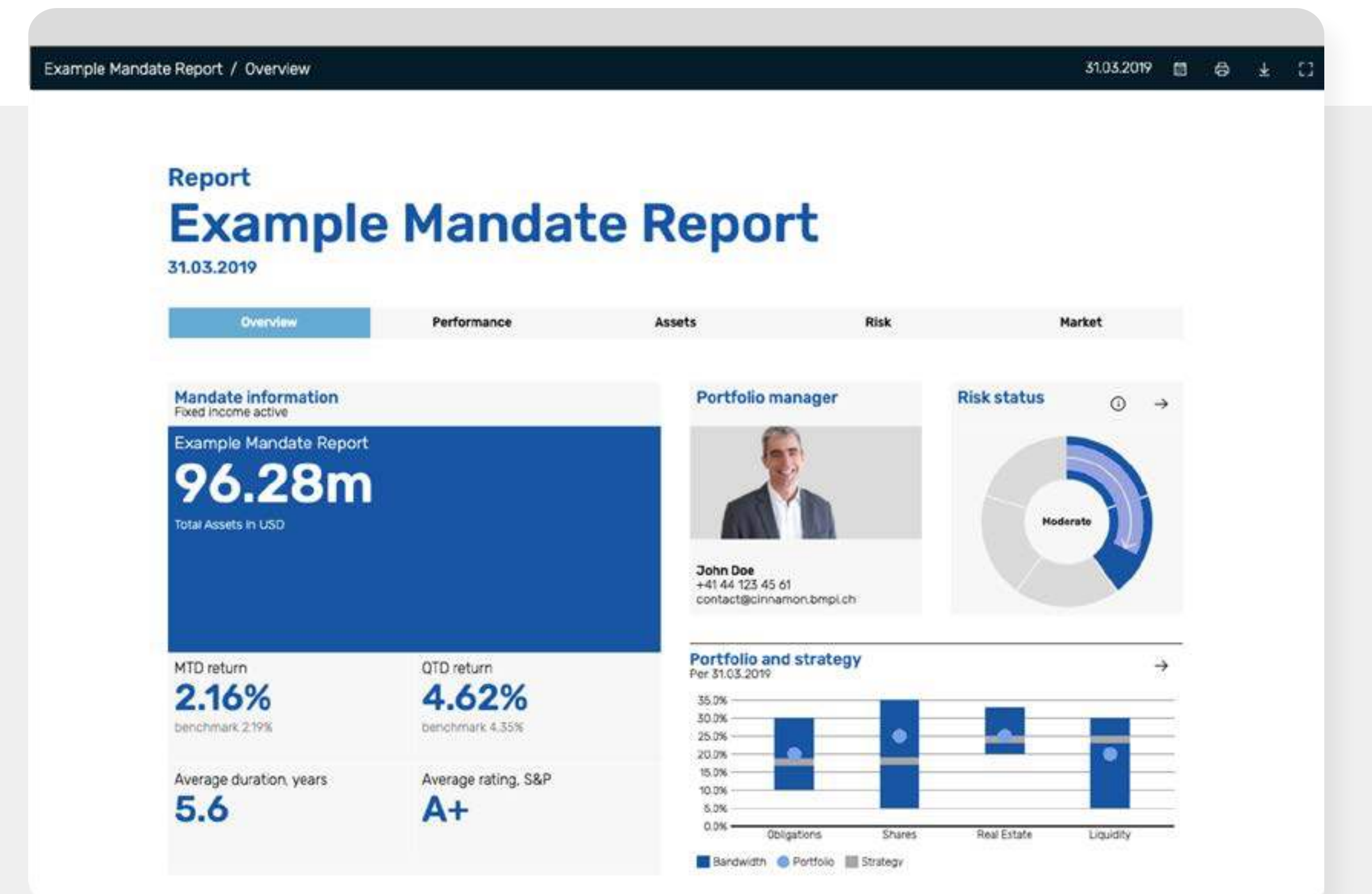


Your content, your design. No matter if it is the logo, the colours or the layout: Cinnamon adjusts to your branding guidelines.

Print Report



Web Report



Modern Technologies – Easy Integration

Cinnamon – Multi-Channel Client Reporting



Flexibility to implement adjustments, also for business users. Cinnamon seamlessly integrates into your system landscape.

A Reporting Data

Do you work with a core banking system or a portfolio management system that you want to connect to Cinnamon directly? No problem, Cinnamon accepts your specific format or uses predefined ones. In the latter case, you can start reporting immediately out-of-the-box.

B Workflow Tool

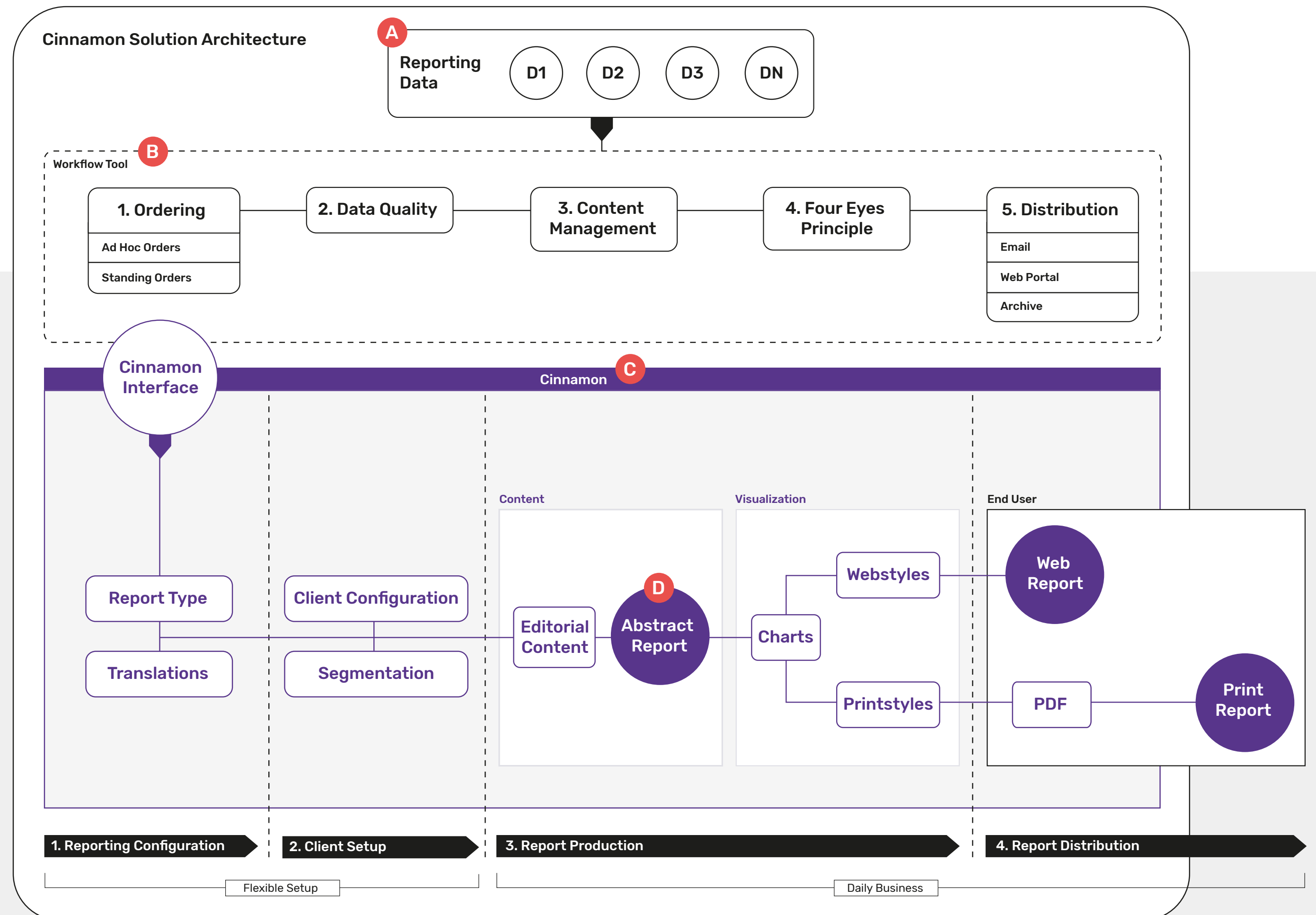
Use almost any workflow tool in conjunction with Cinnamon and thus optimise your business processes. For example, by securing the data quality or implementing a four eyes principle.

C Cinnamon

Cinnamon provides the user interface and is responsible for the definition of the Report Types, Translations, Client Configurations, Segmentations and Editorial Content.

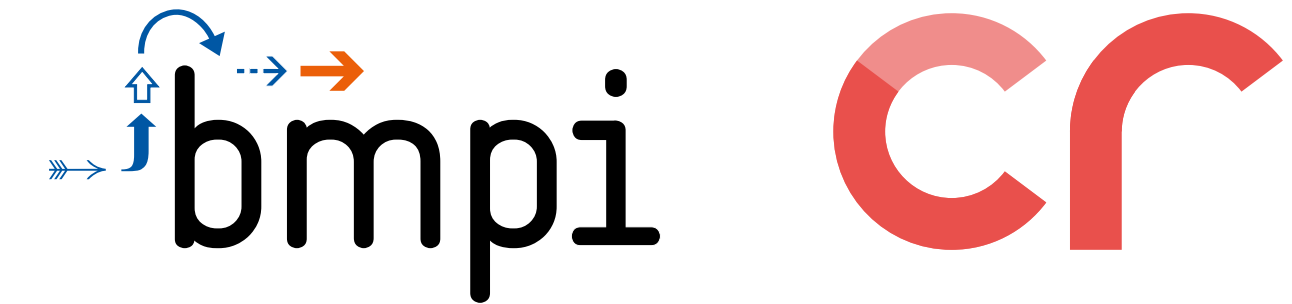
D Abstract Report

An Abstract Report containing all data points and relevant structural information is the basis to produce the reports. Using the abstract report as a basis for all channels, consistency is guaranteed.



bmpi, your reliable software provider

Personal advice. We are looking forward to hearing from you.



Everything from investment data to polished and customisable client reports is our business – Together, we will find out how Cinnamon can improve your client reporting.



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bmpi AG has been a specialist for investment reporting in the financial sector since 1997. Leading banks, asset managers and family offices are recurring customers of ours. They rely on our ability to combine reporting know-how with IT expertise, leading to outstanding results for your organization.

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