

Counterparty Manager: Outreach360

An industry leading technology platform to drive effective client communication by managing and tracking counterparty outreach, documentation, negotiation and communication.

Outreach360 is a standardized platform to create, manage, send, track and store all client outreach and communication necessary for regulatory updates, due diligence and data gathering purposes. The platform supports bilateral communication between all counterparties and leverages the vast database of entity and user information available through Counterparty Manager.

Outreach360 brings new levels of efficiency by enabling you to engage with your counterparties and exchange information to support all regulatory initiatives including:

- IBOR outreach & contract amendment
- KYC and AML related documentation
- US Resolution Stay Protocol adherence confirmation
- Brexit related outreach and documentation
- EMIR and FX Code of Conduct requirements
- MiFID II business rules and re-papering

Sending parties can reconcile their outreach population to determine their impacted contractual counterparties and create bespoke content or leverage multiple industry-standardized questionnaires. It also enables senders to distribute disclosures and request completion of questionnaires. Receiving parties can manage requests via a dashboard, provide information/documents, acknowledge disclosures, send proposed contractual updates, sign contracts, or ask for more clarification on specific questions directly through the platform.

With Outreach360, you can negotiate complex or simple contracts directly on the platform and access the largest network of buy-side and sell-side firms in the industry. Our platform enables you to negotiate contracts based on terms submitted as data point inputs and improve the quality of your contractual data as data points flow downstream to payment, collateral and risk systems.

Outreach 360 also allows the sender to manage the entire communication process that supports regulatory outreach including query management through its Communication Centre.

IBOR Transition

With under two years to go before the end of 2021 and a potential cessation of LIBOR publication, most jurisdictions have taken steps to select and create new benchmarks to transition away from LIBOR. The transition will require thousands of documents to be exchanged and negotiated. Leveraging our Outreach360 platform will allow you to seamlessly hit the necessary deadlines.

Query & Escalation Management

Throughout the lifecycle of an outreach there will be numerous interactions with clients as well as with internal teams. To streamline this process and to ensure a complete 360 view of outreach activity, Outreach360 now has a full case management tool and connectivity to Salesforce via the Outreach360 Salesforce app. KYC and Tax Remediation.

Complement our KYC Services by conducting outreach for client beneficial ownership information, key controller disclosures, anti-money laundering questionnaires, correspondent banking questionnaires, data points around countries of exposure and tax forms. Features including supporting documentation upload and e-signing capability facilitate the process.

Create, Exchange and Negotiate Documentation Securely

Maintain confidentiality of your contacts and securely create, exchange and negotiate documentation through a single web-based portal which provides full visibility and audit into client interactions and responses.

Streamline Operations

Streamline your repapering workflow by agreeing, e-signing, returning, tracking and storing your contracts and regulatory information in one location. Extract information easily in a normalized format.

Enhance Transparency

View the status of all tasks in real time through a customizable dashboard with real-time information and reporting to view the progress of your workflow.

Brexit Remediation and Repapering

The departure of the United Kingdom from the European Union will require mass revision to contractual language on force majeure events, competent or regulatory authorities, data protection clauses, dispute resolution mechanisms and impacted pricing. Leverage our database of self-designated Brexit contacts, conduct outreach and track overall Brexit contractual repapering efforts.

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Regulatory Outreach and Attestation

Outreach to your clients with modified terms of business and disclosures of policy to support compliance with LIBOR, MiFID II, Electronic Trading Due Diligence, FX Code of Conduct and other regulatory initiatives. Manage and track completion of mandatory attestations, including jurisdictional modular protocols and universal stay protocols.

ISDA Amend

In partnership with the ISDA Amend platform, outreach to your clients to clarify regulatory data, request data refresh, or to comply with recent changes in regulations. Engage clients directly from the platform and benefit from a single source of regulatory information alongside your firm's specific data requests.

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