

# PureFacts Financial Solutions partners with CSI to support innovative stock market training simulation

## PROJECT GOALS

CSI and PureFacts began working together in 2005. PureFacts was brought in to help CSI update, launch, and operate an internal stock market simulation training program called **Simvest** for a major Canadian financial institution. This training simulation is an annual program that is rolled out across the national branch network. It was the fifth such program delivered by CSI for the client.

CSI decided that they wanted to focus on their core competency, delivering educational content, rather than maintaining a large development shop in-house. This was the first time that CSI outsourced the Simvest application to a third party.

## KEY BENEFITS

The stock market simulation program turned out to be a great success for CSI and their client, a major Canadian financial institution. Over the six-week program more than 8,000 bank employees successfully participated in the simulation, building awareness and hands-on knowledge of the firm's products and services throughout the entire branch network. For this project, PureFacts offered a complete solution to CSI, providing development work, project management, and customer support.

## RESULTS

The stock market training simulation program went live on November 21, 2005 and was delivered on time under very aggressive timelines. The CSI team was very impressed with PureFacts' responsiveness and focus on client service. Jay Flye, Vice President – Sales, said, "PureFacts displayed a strong focus on client satisfaction and made sure the proper resources were deployed to ensure success of the program".

## WHY PUREFACTS?

CSI decided to partner with PureFacts due to our firm's financial industry experience, professionalism, project management skills, and the strength of its team. CSI appreciated that PureFacts was a very 'hands-on' organization that was committed to providing bottom-line business results. Furthermore, CSI noticed that as a growing, entrepreneurial firm, PureFacts had a lot in common with the Simvest team as they shared a common approach and philosophy centered around serving the customer.

## CLIENT OVERVIEW



**Industry:** Financial Services Education

**Location:** Toronto, Ontario

**Employees:** 110

**Web Site:** [www.csi.ca](http://www.csi.ca)

CSI sets the standard for financial services education in Canada as the most experienced and trusted educator endorsed by regulatory authorities across Canada. Since it was established in 1970 as the Canadian Securities Institute, nearly three-quarters of a million financial professionals have chosen CSI for their career training and development.

In 2007 CSI expanded its educational services with the acquisition of the *Institute of Canadian Bankers (ICB)*. Today, CSI offers one of the most comprehensive suites of courses and programs available to financial services professionals in Canada and around the world.

### FUTURE PLANS

Since the completion of the stock trading simulation program, *PureFacts* has already completed a second major project for *CSI*, involving moving and updating all of their online course content onto a new platform. This project also faced a challenging timeline but *PureFacts* came through again and successfully completed the project on time and on budget.

Moving forward, *CSI* plans to continue working with *PureFacts* on new projects to further enhance their business. Based on our successful track record, *CSI* will turn to *PureFacts* any time they require any new software solutions or technical assistance. As Anna Telidis, Vice President – Operations, said, “We now view *PureFacts* as a partner.”

### ABOUT PUREFACTS FINANCIAL SOLUTIONS

For over ten years, *PureFacts* has been successfully developing information management solutions to keep businesses responsive and nimble – both today and tomorrow.

We do much more than design and sell software. We bring CEOs and CIOs together through access to high quality, reliable and useful information on every aspect of operating and financial performance. When finance and information technology teams talk in terms both can understand, information quality improves – as does the ability to manage the enterprise.

This is where we come in. Not only will we help you build bridges within your business using collaborative tools everyone understands, but we'll also show you a healthy and consistent return on your investment.

“This is the first simulation that we’ve used an external partner to help develop the simulation web site and lead the overall project including communication with the client. It was an extraordinary display of teamwork and commitment to delivering a high quality customer experience under a tight deadline. *PureFacts* has done a fantastic job of managing this project.”

~ Jay Flye  
Vice President, Sales



#### PureFacts Financial Solutions

372 Bay Street, Suite 1400  
Toronto, Ontario  
Canada M5H 2W9

416.598.1241 [main](#)  
888.596.9338 [toll free](#)  
416.598.9226 [fax](#)

[query@purefacts.com](mailto:query@purefacts.com)  
[www.purefacts.com](http://www.purefacts.com)