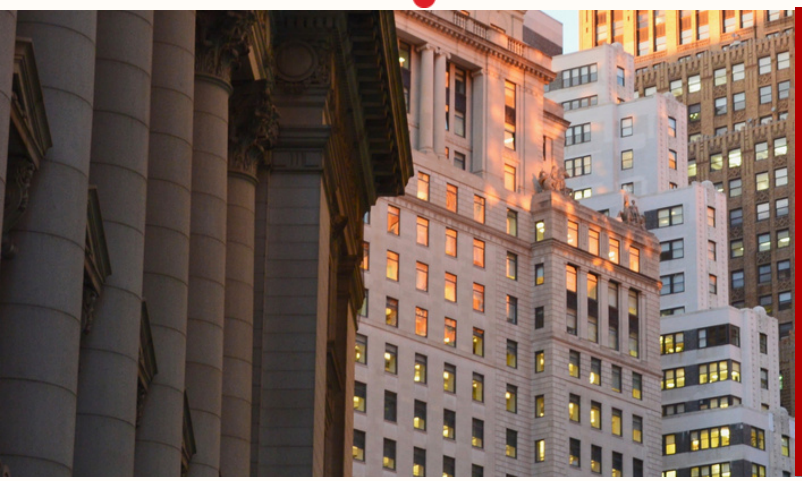
TOKARA SOLUTIONS®



Brown Brothers Harriman

Financial Services

Pivotal CRM

Who They Are

Brown Brothers Harriman (a.k.a. BBH) is the oldest (founded 200 years ago) and **one of the largest private investment banks** in the United States. Focused on investor services, private banking, and investment management, Brown Brothers Harriman provides advisory, wealth management, commercial banking, and investor services for corporate institutions and high-net-worth individual clients. Headquartered in Manhattan, BBH employs more than 6,000 employees.

Solutions

Like many Pivotal customers, BBH has been using the application for over a decade and is now looking to provide a refreshed UI into Pivotal via the Pivotal UX and Tokara Solutions' Widgetizer add on utility. Several years ago, BBH made a strategic decision to **utilize top-end Pivotal Professional Services talent** to augment their IT team so that their Pivotal instance could provide maximum value to their end-users. Tokara Solutions followed our corporate values of stability and consistency by providing the same two resources to BBH over several years. Tokara Solutions' dedication has allowed BBH access to resources that are extremely strong in Pivotal and also knowledgeable about BBH.

> Tokara Solutions has been a pleasure to work with. They are professional, transparent and go over and beyond to be accommodating and attentive to client needs. Tokara Solutions are an A+ example of great client service!
>
> Kelley Barnhardt, V.P. Private Banking Technology

Success Story

With Tokara Solutions' guidance, CRM seniority, and Pivotal expertise, BBH is continuing to move forward with their **deployment of Pivotal UX**. We remain on target to get the new application live in Q1 2022. This project will further enhance the Financial Services Template with many efficiency improvement enhancements and core system integrations. Pivotal UX will also allow a pure thin client deployment for many BBH employees, thus reducing IT's workload.

> BBH has used Pivotal for over a decade with great benefits. With UX they are setting themselves up to use it for years to come.