INVEST KL
Project Brief

01 COMPANY OVERVIEW

Mandated to attract large global multinationals such as Fortune 500 and Forbes 2000 companies to establish their regional business, innovation, and talent hubs in Greater KL, InvestKL in essence provides a gateway for companies to grow their business in Asia.

02 CHALLENGES

- As part of their process in positioning Greater KL as an ideal destination for multinational companies to set up their regional business, InvestKL required investors to submit and update data regarding their business.

- The challenge that both InvestKL and their investors faced was that all data had to be filled up manually via forms by the investors. These forms were then submitted to InvestKL's admins who keyed in these data into Excel sheets; this limited the admins in terms of managing the data collected.

- Furthermore,the data entry was at times subject to human error as it was not entered by the investors directly onto the sheet and led to a possibility of data loss due to manual input. In short the task of consolidating and validating data from investors was consuming too much of the admins' time.

Lava Protocols set out to help **InvestKL** by implementing **Salesforce®, the #1 CRM solution in the world** and by building custom functions with the help of our subsidiary, Lava Labs. The functions within the system included the following:

Web portal for Investors

The idea behind the web portal was to create an interactive and user-friendly portal to track information regarding an investor's expenditure. It would enable investors to directly provide investment data every quarter which is then directly integrated with to Salesforce. The portal is augmented with an information delivery system which comprises of:

- Notifications to individual investors
- General announcements to all investors
- Job postings by investors which are then available to the public

Web application for Investor Data Management

We also created a web application with two types of user access for investors:

- Investor access - Investor Web Portal
  - This access provided investors with an interface to perform simple data entry.
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  - This access provided investors with an interface to perform simple data entry.
    - Investment data control
    - Announcements and notifications
    - Job postings verification and validation

Backend Content Management System of Web PortalSystem

The backend of the portal is managed through a Content Management System (CMS) which is protected with encryption and authentication. It serves all the request and queries made on the web application. For example, the CMS pushes results when a search is made by a site visitor. It also manages the data of queries such as form submissions.

Integration to Salesforce

We helped InvestKL by orchestrating a real-time integration via web services to Salesforce on investor tracking as well as job tracking. This meant every time an investor submitted data into the CMS, it will be synced to Salesforce in real-time to their relevant modules.

Job Postings on Web Portal

Lava was able to add value to InvestKL by incorporating a job posting function. This meant investors were also able to leverage on InvestKL to post about job vacancies in their companies that were based in Greater KL.

Through a combination of Salesforce solution and Lava's custom developed services, InvestKL was able to provide an easy-to-access and readily-available investment management system to both their admins and investors. InvestKL also enabled its users to easily keep track of the information attached to the investors and eliminated the possibility of data loss or data entry error because investors now take responsibility for their data submission.

They also cited the following improvements:

- No hardware maintenance
- Internet browser based and mobile friendly access
- Real-time data visibility
- Real-time information management and distribution
- Standard reports can now be generated instantly based on real-time data provided directly from the investors
- Increased efficiency and enhanced operational and statistical data management capabilities of all users of the system (both InvestKL and their investors)

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