



# Convoy Global Holdings Limited

## Customer Spotlight

Convoy Global Holdings Limited is Hong Kong's leading listed independent financial adviser with financial planning, insurance, asset management, MPF and money-lending business, and operations in Hong Kong, Macau, and China.



### Key results



Secure sharing with external partners



Increased mobility and agility



Simple, more effective collaboration

“Dropbox Business has given me insight into the teams behaviour from a technology perspective, which in turn allows me to come up with ideas that make their process more efficient.”



Leo Cheng  
CIO, Convoy Financial Group

### The challenge

Making workflows more productive

As a leading independent financial services platform in Asia Pacific, Convoy's motto is “life is an investment” and its mission is to help provide customers with personalised financial advice. The company is the largest financial services platform in Hong Kong and employs more than 1,500 independent financial advisors across Asia and the globe.

Managing sensitive and often confidential customer information on a daily basis meant that Convoy's Mergers and Acquisitions (M&A) team relied on FTP servers, emails, and encryption methods to provide confidential support and share financial information with clients and partners. These were proving to be cumbersome for its

global workforce and it was becoming difficult for the team to stay up-to-date with the latest version of a file.

Convoy needed a secure, centralised location for all of its files and client information, and after exploring a number of file storage and collaboration solutions, it ultimately chose Dropbox Business. According to Leo Cheng, the CIO at Convoy, “We used FTP servers and email to send and share documents, but the process was time consuming and sometimes files were difficult to access remotely. We also had no control over file versions. Even within the team it was difficult keeping track of the most up-to-date document.”

### The solution

Empowering a global workforce

The move to Dropbox Business has not only provided

Convoy with a centralised file repository, it has also allowed the M&A team to increase productivity across workflows and collaborate effortlessly with clients and target companies. Although Leo evaluated several solutions, he chose Dropbox Business because personal accounts were already proving to be a popular collaboration solution for the team.

As Leo explains, "Our team members used personal Dropbox accounts already, so it was very easy for them to transition straight over to the business product. Also, as our M&A team is quite mobile and located across different countries, they could immediately access the files they needed no matter where they are in the world or what device they were using."

But perhaps the most important advantage of Dropbox Business was the ability to share information confidentially with necessary parties. "We don't need to create a special portal to share files with clients or partners. With Dropbox, you can just share a link and everyone can have access to all of the documents and information that they need, and nothing that they don't. Dropbox Business is a

much more user-friendly solution for us," says Leo.

### The results

Improved collaboration and better insights

Convoy's experience with Dropbox Business has been so successful that Leo is using the platform to understand the unique requirements of his team. From a reporting perspective, Dropbox Business has provided insights into the team's usage and behaviour patterns.

"Dropbox Business has given me insight into the team's behavior from a technology perspective, which in turn allows me to come up with ideas that make their processes more efficient." From Leo's point of view, the rollout has been incredibly smooth.

"It's very user-friendly tool to use," he says. "Since adopting Dropbox Business, our team is able to collaborate better. And as a company, our workflows are becoming more productive, we can save time, and there's more transparency between team members."

### Use case

### How Dropbox Business helps

Control	Clients are provided with the storage service, but permissions keep company folders protected.
Mobile	Content can be collaborated on by teams working in multiple locations and marketing collateral from events can be quickly uploaded and shared.
Sharing	Files can be shared with partners, clients and external agencies in a user-friendly and best-practice format.

"We have 70 people spread across seven locations in Asia and we're able to operate like we're all in the same location."



Leo Cheng  
CIO, Convoy Financial Group

To learn more about what Dropbox can do for your business, please visit [www.dropbox.com/business](http://www.dropbox.com/business) or email us at [sales@dropbox.com](mailto:sales@dropbox.com).

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