

Excellence Award – Tricor Services Limited

卓越獎 – 卓佳香港



Report Summary

Provided by Tricor Services Limited

Company Background

Founded in 2000, Tricor Group has been the leading business expansion specialist in Asia. We provide professional and reliable operational support for companies and entrepreneurs, empowering them to focus on core business functions to establish and expand their businesses across the region.

Tricor Hong Kong is the headquarter of Tricor Group. We are a one-stop professional service provider serving over 10,000 clients across industries, including more than 50% of listed companies in Hong Kong. We offer a full suite of professional solutions and services which cover a company's operational needs at different business stages from start-up to IPO and beyond, empowering the company to expand its foothold. Our strong track record has made us the benchmark for professional services in Hong Kong.

Leadership

Tricor Hong Kong has a capable team of 600+ professionals who are led by CEO Joe Wan and more than 20 senior executives heading various service teams and divisions.

The leadership team brings out the values of Tricor, which include:

- Maintain a start-up mindset with agility, flexibility and adaptively to changes
- Leverage collective genius through collaboration
- Induce passion and positive energy to work
- Present genuine care to clients, colleagues, ourselves and the environment
- Demonstrate integrity in all we do

These values guide how we do business, help us stay at the forefront of the industry, remain client-focused, maintain the highest ethical standards, and continue to improve.

報告摘要

本報告摘要由卓佳香港提供

公司背景

卓佳集團成立於2000年，一直以來是亞洲領先的業務拓展專家。我們為企業和企業家提供專業可靠的營運支援，讓客戶無後顧之憂，全力專注於業務發展，以在區內建立並拓展業務。

卓佳香港為卓佳集團的總部，提供一站式專業服務，接有超過10,000位跨行業的客戶，包括過半數香港上市公司。我們提供全面的專業方案及服務，涵蓋企業從初創到上市各個發展階段的營運需要，協助企業發展潛能，拓展業務。我們彪炳的往績，使我們成為香港專業服務的翹楚。

領導才能

卓佳香港擁有超過600名專業人士組成的團隊，由行政總裁溫佩麟及超過20位高級管理人員所帶領。

這卓越的管理團隊協助帶出卓佳的價值，包括：

- 保持初創企業的心態，靈活、富彈性地應對和適應市場變化
- 透過團隊合作發揮集體智慧和能力
- 為工作注入熱情和正能量
- 對客戶、同事、自身及環境表達真誠關懷
- 在任何事情上展現正直誠實的操守

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In addition, we have a strong emphasis on the long term – we look beyond the short term and eye on the “infinite game” that we will continue to play in the long future – and leading ahead – we strive to always stay ahead of the market, our clients and competitors.

Strategy

Tricor has six strategy focuses: Asia-anchored, Commercial-driven, Client-centric, Technology-empowered, People and ESG.

Currently, our key strategic opportunities lie in the global trends of digitization and outsourcing.

We are also making a shift from product-driven to client-centric nature to take on the strategic challenges in the professional services industry and to meet new market expectations.

Customers

Tricor Hong Kong has a strong client commitment. This client-first approach can be reflected in our slogan “At Your Service”.



Tricor Hong Kong, led by CEO Joe Wan and more than 20 senior executives, is committed to providing innovative, top-notch solutions and services to our clients, enabling them to navigate from start-up to IPO and beyond.

卓佳香港在行政總裁溫佩麟及20多位高層管理人員的領導下，致力為我們的客戶提供創新、一流的解決方案和服務，讓他們能夠專心開拓業務 — 從初創至IPO至無限。

這些價值指引我們如何營運，助我們在業內保持領先地位、專注客戶所需、持守最高的道德標準及持續改進、精益求精。

此外，我們放眼長遠發展 — 我們的眼光超越短期成績，更著眼於「無限賽局」式的長久持續發展。我們亦致力領先業界，走在市場、客戶及同業之先。

策略

卓佳專注六項策略目標：亞洲主導、商業為本、客戶為先、科技驅動、頂尖人才，以及環境、社會和管治。

我們目前的主要機遇在於全球的數碼化及工序外判潮流。

我們亦正從產品為本轉型至客戶為先，以應對專業服務的行業挑戰，並趕上不斷變化的市場預期。

客戶

卓佳香港重視客戶承諾，客戶為先的信念充份反映在我們的品牌理念「為你服務」之上。

我們服務直接客戶，包括企業、個人消費者和商業夥伴；以及間接客戶如業界組織、傳媒及卓佳的前雇員。我們制定了客戶體驗流程，訂立服務藍圖，羅列出我們如何在不同的接觸點與客戶交流和提供服務。透過在每一個接觸點提供最佳的客戶體驗，創造出超凡的客戶旅程，維持良好的客戶關係。

我們定期調查客戶的滿意度、不滿意之處和互動性，並針對性地作出即時回應和改善。卓佳香港每年均會委託獨立第三方進行客戶調查，更廣泛和充份地了解客戶對我們服務的滿意度。

評估、分析和知識管理

卓佳透過多方面評估公司表現，包括業績、營運、財務和員工表現，而每一方面都有清晰、明確的評估標準。公司內部會舉行兩週一次的業務委員會及營運委員會會議，時刻了解公司在每一業務範圍的表現。

所謂知己知彼，卓佳亦會密切留意同業的表現並作出比較。

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We serve both direct clients including B2B, B2C clients and business partners, and indirect clients such as industry associations, media friends and Tricor's alumni. We have mapped out a client journey and built a service blueprint which shows how we interact with and serve our clients at multiple touchpoints. By delivering the best client experience at each touchpoint, we create an exceptional journey for our clients and maintain good client relationships.

We also constantly survey on our clients' satisfaction, dissatisfaction and engagement, and respond immediately and accordingly to their feedback. Tricor Hong Kong engages an independent third party every year to conduct a survey on and monitor client satisfaction more broadly.

Measurement, Analysis, and Knowledge Management

At Tricor, we measure our organizational performance from multiple perspectives, including business, operational, financial and employee performance. There is a clear set of performance parameters for each of these perspectives. We hold bi-weekly Business Council and Operations Committee meetings to keep track of the performance in each area.

We also closely monitor the competitor landscape and compare our performance against theirs.

These data and information are gathered, organized and stored in consistently architected central repositories, which are available company-wide and are easy-to-access on digital platforms. Employees can access these central repositories, review the data regularly, keep track of the progress and learn from one another and collectively.

Workforce

Building an effective and supportive workforce is our top priority. We carry out effective workforce planning by underpinning a solid understanding of the company's strategic direction and business goals, as well as our current workforce capacity, capability, skills and knowledge.

這些資訊會被收集、組織和儲存於我們的中央資料儲存庫，公司上下都可根據需要瀏覽與其崗位相關的數據，定期審視，了解進度，互相學習。

工作團隊

建立有效及有能力的工作團隊是我們的首要任務。管理層和人力資源部會透過對公司的策略方針和業務目標，以及目前工作團隊的大小、能力、技能和知識的全面了解，制定有效的團隊策劃。

我們採取能力為本的招募評估以招聘新的員工，以聘用市場上最優秀的人才來增強團隊能力。對於每一位員工，均有特定的框架去訂立目標，推動出色的工作表現。

我們看重工作團隊成員的滿足感，每年均會進行兩次僱員投入度調查。公司開放、透明的企業文化，鼓勵團隊內和團隊間的緊密合作和坦誠溝通。

營運

卓佳從豐富的行業經驗發現到，一間企業的成功營運有賴於四個非常關鍵的要素：財務、管治、人才和數碼化，它們組合起來成為了卓佳的成功方程式Tricor Inside。在這個框架下，我們協助客戶達至業務及營運上的成功，從而推動自己的成功。



SPOT, our proprietary all-in-one hybrid meeting solution, was awarded the Hong Kong Business Made in Hong Kong Award in 2020. It is an advanced meeting platform with integrated functions of live streaming, online attendance, e-voting and real-time Q&A, designed to address the challenges of holding general meetings amid the pandemic.

融會 – 卓佳專有的一站式混合會議解決方案 – 榮獲2020年 Hong Kong Business Made in Hong Kong 獎。這一先進的會議平台結合網上直播、網上出席、電子投票及即時問答等功能，為疫情期間舉行股東大會提供及時的解決方案。

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We adopt a competency-based recruitment assessment system to recruit new workforce members and we hire top performers in the market to enhance our capability and competency. For all employees, we have a goal-setting framework to encourage outstanding performance.

Workforce satisfaction is our top priority, as evident in our twice-a-year employee engagement surveys. Our open and transparent organizational culture also encourages close collaborations and frank communications within and across teams.

Operations

At Tricor, we have identified four key drivers that are vital to a company's operational success: Finance, Governance, People and Digital, forming a winning framework of Tricor Inside. Guided by this framework, we help our clients achieve business and operational success, which in return drive our own success.

Our key work processes are based on the service blueprint which shows how we interact with and serve our clients at multiple touchpoints along the client journeys. When determining work processes, we first get a full understanding of how teams work; what resources are available and required; and what outcomes we want to achieve. We also ensure our clients are comfortable with our work processes, as well as all processes are in compliant with regulatory requirements and aligned with industry best practices.

We have set up Tricor Ace, a shared service center installed with more than 100 Robotic Process Automation, to manage efficiency and cost, supporting our clients with financial accounting, payroll, IT, corporate services and other functions since 2019.

Results

Tricor has doubled its revenue over the last decade and recorded double-digit compounded annual growth rate in EBITDA over a three-year period. In 2020, we rolled out a number of innovative digital tools to help our clients digitize and enhance corporate governance. These new solutions have been gaining traction quickly in the market.

We are also proud to record 97% positive ratings on client satisfaction in our latest client survey, and 96% of Tricor Hong Kong's clients are loyal clients.

While the professional services industry is highly competitive with a low barrier of entry, our strong team has enabled us to be the top provider of corporate secretarial, IPO and share registry services in town. We have participated in 50%+ IPOs on HKEX, and are the corporate secretarial advisor for 270+ listed companies, supporting their secretarial and corporate governance compliance processes. We currently offer professional services to 1,500+ listed issuers in Hong Kong, with over 50% of market share.

我們的主要工作程序，建基於服務藍圖，羅列出我們如何在客戶旅程上的不同接觸點與客戶交流和提供服務。制定工作程序時，我們會首先全面了解不同的團隊如何運作、有甚麼資源和需要，以及我們期望得到甚麼結果。團隊會確保客戶對有關工作程序感信心，而所有工作程序均合規合法，並與業界的最佳實踐一致。

卓佳建立了一個共享服務中心 Tricor Ace，設有超過 100 個機械人流程自動化程式，加強管理效率和成本，自 2019 年起支援客戶的財務會計、支薪、資訊科技、企業服務等需求。

業績

在過去 10 年，卓佳的收入錄得雙倍增長，3 年來在扣除利息、稅項、折舊及攤銷前盈利上，有雙位數的複合年增長率。並在 2020 年推出了一系列的創新數碼工具，協助客戶推行數碼化及加強企業管治，這些新的數碼方案很快便在市場上取得佳績。

我們亦很自豪能在最新的客戶調查中取得 97% 的正面客戶滿意度，而有 96% 的卓佳香港客戶，均為忠誠客戶。

專業服務業因為入門門檻低而競爭激烈，但強大而專業的團隊，令卓佳成為香港公司秘書、首次公開招股及股份登記服務的領先服務供應商。我們曾參與香港證券交易所過半數的新股發行，是超過 270 家上市公司的公司秘書顧問，支持其公司秘書及管治合規工作，我們目前為超過 1,500 間香港上市公司提供專業服務，市場佔有率為 50% 以上。