



**Mindtree**

A Larsen & Toubro Group Company



## An American holding company improves customer engagement by 30% by using analytics and self-service for its user portal

The client is an organization that has \$724.1 billion of assets under management. Operating from 25 countries, it needed to urgently re-model and re-build its customer and corporate portal for self service capabilities. Its existing portal could not meet the new demand from advisors and users and needed improved functionality to aid faster decision-making and provide a consistent experience over devices. Underlying this was the client's strategic need to stay ahead of competition or be prepared to lose business. It therefore took the decision to modernize and target a minimum 30% improvement in customer engagement.

### **USING A MIX OF DESIGN THINKING, PLATFORM INTEGRATION, ANALYTICS AND PROCESS RE-ENGINEERING**

The engagement to deliver NextGen features for the US and international portals of the client spanned two years. The re-engineering approach was led by Design Thinking and was persona-driven. This helped focus on creating customizable and easy-to-use self-service functionality for users.

The goal for the US portal was to enriched user experience with a responsive, intuitive, scalable and futuristic platform for financial advisors to manage portfolio sizes >\$90 million. The goal for the Europe

portal was to enrich user experience and cater to users from different countries.

The solution implemented by Mindtree integrated accounts, profiles and marketing platforms thereby providing a seamless user experience. Customizable widgets were created to provision self-service across devices/channels, analytics-driven product recommendations improved outcomes and interactive visuals provided asset summaries and sales performance.

#### The tools, technologies and processes used to deliver the enhancements included:

- RWD with Angular JS
- Jersey
- Spring
- Apigee
- iOS and Android
- Oracle
- WebLogic
- CI/CD using Bamboo
- SVN
- Sonar
- Agile DAD
- DevOps for CI/CD

Mindtree used scalable architecture and consolidated data from multiple applications to a single accounts platform. These platforms were further strengthened with chat and co-browse capabilities. The outcome was improved decision-making and superior engagement. Finally, the process steps were reduced to speed up transactions for buy, sell, exchanges, etc., contributing to further improvement in performance.

Mindtree used a team size of 50+ in an off shore delivery model for this critical engagement.

### GREAT USER EXPERIENCE WITH FUTURE-READY FEATURES

The complex engagement was kept on schedule and within budgets with precise planning, by mapping user stories to feature design, strong governance and flawless issue resolution. The key benefits delivered to the client include:

- Reduced cost of ownership using CICD pipeline built for US Digital Ecosystem and International Digital Ecosystem
- 30% improvement in customer engagement using self-service, analytics and interactive modules
- Ability to on board new APIs with ease, enabling flexibility
- Customizable widgets for advisors providing a 360 degree view of sales and sales progress
- Highly scalable technologies to meet demand volumes

Among the upsides created by Mindtree is multilingual support capability for the future, although this is not in scope for this phase.

Modern financial services are generating and blending more data than ever before in order to take better decisions. But the volume of data quickly becomes a bottleneck. It is therefore imperative to place the power of analytics, self-service and interactive tools in the hands of users, without which customers experience will deteriorate.

---

## ABOUT MINDTRE

Mindtree [NSE: MINDTREE] is a global technology consulting and services company, helping enterprises marry scale with agility to achieve competitive advantage. "Born digital," in 1999 and now a Larsen & Toubro Group Company, Mindtree applies its deep domain knowledge to 300+ enterprise client engagements to break down silos, make sense of digital complexity and bring new initiatives to market faster. We enable IT to move at the speed of business, leveraging emerging technologies and the efficiencies of Continuous Delivery to spur business innovation. Operating in 18 countries and over 40 offices across the world, we're consistently regarded as one of the best places to work, embodied every day by our winning culture made up of over 21,000 entrepreneurial, collaborative and dedicated "Mindtree Minds."