

ADVISOR STORE FRONT FOR A GLOBAL WEALTH MANAGEMENT FIRM



Capgemini helps a major investment management firm to enhance financial advisor's experience

CHALLENGES

A major investment management and financial services firm realized that a multi-authoring environment across groups impacted financial advisors' experience. They eventually understood that their legacy platform affected website experience to all of its users. It became clear that effective tags and search functionalities with responsive website is needed to offer a seamless end-user experience.

SOLUTION

Capgemini worked with the company to develop a responsive website design across online channels that would enable them to provide an enhanced experience across multiple platforms. Migration of client's assets and content was completed using Capgemini's proprietary migration tool and Digital Asset Management platform. This helped the firm to reduce the total cost of ownership. Wide range personalization was ensured by developing and integrating many experience fragments with Adobe Target. In order to provide effective page rendering, Tags and search functionalities were integrated into Adobe Target and Adobe Analytics platform. An additional advanced search was activated using Solr search engine to further enhancement of user experiences.

IMPACT

STREAMLINED
AUTHORING PROCESS

REDUCED
TOTAL COST OF OWNERSHIP

ENHANCED
EXPERIENCE FOR FINANCIAL
ADVISORS

FOCUS AREA

(Alternative – Challenges in a snapshot/Challenges at a glance)

- Ineffective Financial Advisors' experience
- Limitation of legacy platforms to provide responsive website experience
- Ineffective tag management and search functionalities

ADOBE SOLUTIONS

- Adobe Experience Manager
- Adobe Target
- Adobe Analytics

About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of over 350,000 team members in more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2021 global revenues of €18 billion.

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