



ADVISOR STORE FRONT FOR A GLOBAL WEALTH MANAGEMENT FIRM

Capgemini streamlines authoring process for investment management firm to enhance financial advisors' 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 helped the global investment firm to migrate all seven applications used by their financial advisors that operated on a legacy platform to Adobe content management platform. A responsive design on Adobe platform was created to support across all three break points - laptop, mobile, and tablet. Migration of 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

ENHANCED FINANCIAL ADVISORS' EXPERIENCE

SEAMLESS DATA MIGRATION

STREAMLINED AUTHORING PROCESS

ENHANCED SERVICE OFFERINGS AND PERSONALIZATION

FOCUS AREA

- Delayed authoring and publishing environments owing to multiple platforms
- Ineffective search engine design
- Ineffective tag management and search functionalities

ADOBE SOLUTIONS

- Adobe Experience Manager
- Adobe Analytics
- Adobe Target

About Capgemini

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