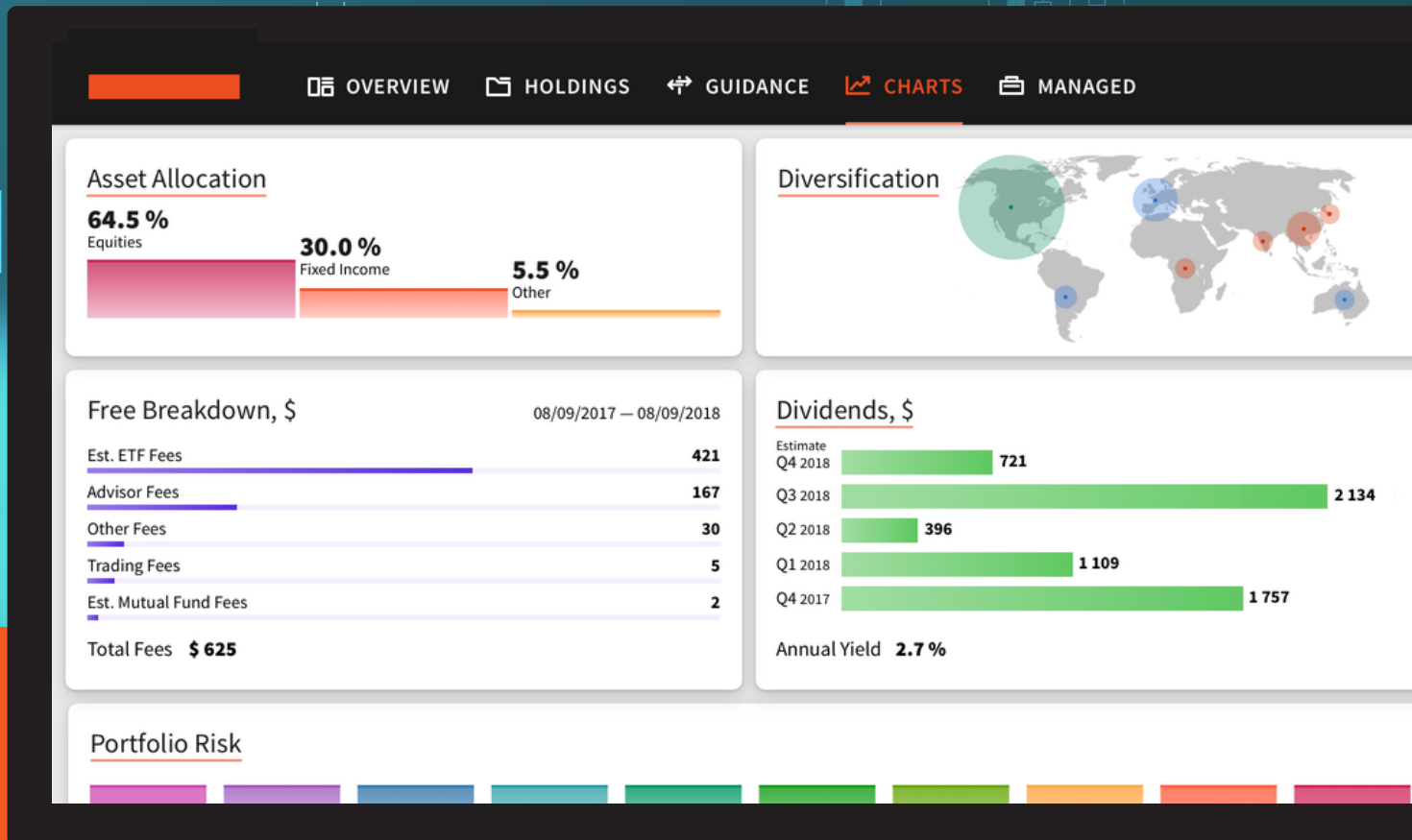


Devexperts Develops a Proprietary Investor Portal for Increased Customer Acquisition



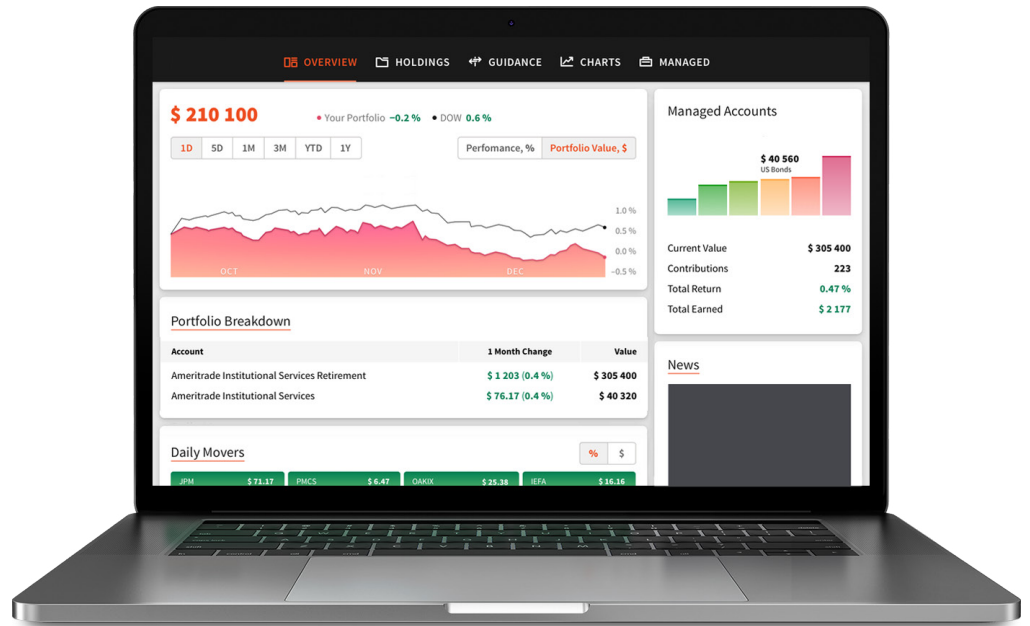
ABOUT THE CUSTOMER

The Client is a private investment company based in the US. It has been in business for over 20 years, working with high net worth individuals, investment companies, pension and profit sharing plans, charitable organizations, and corporations. With almost \$30 billion in assets on their platform, the Client builds financial portfolios according to their customers' demands and manages their funds and investments.

CHALLENGE

The Client required a replacement for their investor portal, a software application for investors to see their assets and manage their portfolios, and for advisers to provide investors with investment strategy options and financial reports. The Client's legacy investor portal was inconvenient for advisers in terms of design, performance, and core features. Therefore, advisers were hesitant to use it, leading to customer attrition in the Client's business. The Client could not update their legacy portal to satisfy the advisers' expectations because it was a third-party out-of-the-box solution.

This task was complicated by the Client's requirement for a software developer to integrate a new solution into the existing infrastructure, which was connected to various venues and had an overview of transaction history and holdings.



SOLUTION

The Client chose Devexperts due to its offer to develop a proprietary investor portal with a conceptually new frontend and smooth integration with the existing infrastructure. An investor portal is a part of a turnkey asset management program.

Having a pool of experience in integration with third-party software systems, combined with the best UI developers in the financial industry, Devexperts needed only nine months to release a new investor portal and replace the legacy solution. In such a short period, Devexperts was able to perform analysis of the Client's business processes, identify the best use cases, develop design concepts, and implement the product.

Devexperts developed an entirely new investor portal with a state-of-art UI, which is equally efficient and easy-to-use on desktop PCs and mobile devices. The software provides a clear view of investment goals and overall portfolio. Advisors praised the new investor portal for its functionality and performance.

RESULTS

As a result of the meticulous work within a limited time period, Devexperts delivered to the Client the following:

- A brand new investor portal that replaced the Client's legacy application
- Seamless integration with the Client's infrastructure
- The state-of-art UI, equally efficient on desktop PCs and mobile devices

Implementation of the new investor portal resulted in increased customer acquisition.



Describe your business challenge and we will suggest a solution

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