




Acting like a fintech: Helping a traditional firm create new business

A financial institution needed a new way of working to service clients better

Industry: Investment management
Location: North America

Technology and services

-  SaaS
-  AWS cloud integration
-  Operating model design
-  Agile-at-scale



Business need






-  The company needed to achieve its long-term strategies of helping investors meet their financial goals, increasing advisor efficiency and productivity, and making an impact on the economics of the advisory services industry in its chosen market.
-  It needed a partner to help with the setup of an entirely new business model based on a Software-as-a-Service (SaaS) platform, to differentiate its products and services while extending the reach and ability to attract and keep new clients.
-  It required a new, fintech way of working to test and learn for continuous improvement, adapt better to change, and rapidly develop products and launch them to market quickly.

Solution

-  Capgemini deployed a team of experts to architect a greenfield cloud-based SaaS platform and implement the necessary structural changes needed to support a SaaS business.
-  Conducted iterative market research using design prototypes to determine the target user experience
-  Created a future-state product-capability map with corresponding data considerations
-  Developed a business case, go-to-market plan, and program strategy and vision in the creation of a new operating model to support human-centered design prototyping
-  Leveraged Capgemini's cloud, microservices, and SaaS technology capabilities and expertise in supporting clients in the wealth-management industry
-  Executed with speed and brought a product to market within one year



Results

-  Successful launch of the client's first SaaS platform, defining a new and fintech way of working for its business unit with a more product-centric view of products and agile-at-scale operations
-  Flexible architecture, along with a roadmap and product-implementation approach, for supporting the agile development of new client-facing tools
-  Pattern library to support application functionalities, an entitlements framework, and models for multi-tenancies (in platforms, applications, and data)
-  Clickable design prototypes of the application and product-experience journey
-  Accelerated the ideation to delivery



To generate business value, visionary CIOs must transform the technology and operating model simultaneously, entering a new paradigm. We call this new paradigm Inventive IT.

For more information, please visit Capgemini Invent's [Inventive IT](#).