



A leading international banking group catalyzes customer engagement with investment research platform



Revenue growth driven by attracting more customers through a customer-centric digital research platform

Enhancing engagement with a valuable research platform

One of the largest financial institutions worldwide is located in the UK and supports an extensive clientele with a diverse range of financial services. To do so, the organization operates with a significant global workforce and maintains a presence in major financial hubs.

The bank's sell-side research platform, which offers its insights and studies to a broad public audience, wanted to improve engagement rates, the number of reads per report, and overall site visits while addressing extensive off-platform content consumption.

To gain a more in-depth understanding of the situation, Capgemini conducted a user behavior analysis. The results revealed high bounce rates, numerous search failures and unsubscribes, and that subscriptions were predominantly internally generated. Feedback from the bank's clients indicated that they were looking for a better user experience to properly engage with the platform's valuable research.

Given this insight, the bank concluded that its platform would move from an organization-centric to customer-centric application and switch from a custom legacy internal content management system (CMS) to a best-in-class enterprise CMS using an average effective maturity (AEM)/React-integrated accelerated payment program (APP) to support the bank's current Infrastructure.

Client: Leading international banking group

Region: North America

Industry: Banking & capital markets

Client Challenges:

The bank wanted to enhance user engagement and experiences by modernizing its sell-side research platform, enabling personalization and more distinguished services.

Solution:

Capgemini helped improve the customer experience by adopting a user-centric approach, developing customer archetypes, and mapping user journeys as part of an improved investment research platform that will be rolled out to customers, analysts and sales operations teams globally.

Benefits:

- Increased user interaction with targeted and personalized content
- A robust publishing flow to cross-sell and upsell products
- New, platform-specific features to attract users from competing platforms and aggregators
- Focus on Provide Click to action feature for the customers to drive engagement / actions after consuming the research
- A scalable platform design and features



Defining user personas and a path to transformation

To improve the digital interface of the research, sell-side platform and customize it to deliver a top-notch journey, Capgemini supported the bank in a comprehensive customer experience transformation. The process began with stakeholder interviews and extensive dialogues with a diverse client base, leading to the development of detailed personas. These insights revealed specific behavioral patterns, needs, and motivations, which were the key to identifying a targeted list of essential functions for the platform.

This knowledge, combined with a nuanced understanding of the business, led to mapping vital strategic decisions. A vision statement was created to describe the platform's future and the necessary job roles for the envisioned state were defined.

After these strategic determinations, the bank worked with Capgemini to conceptualize the future-state platform by ideating and designing experiences, features, and products that cater to the distinct preferences of the targeted personas. This vision was further validated through subsequent research sessions, which ensured satisfaction and engagement.

After gaining all these insights, the project team proceeded to build a customer-centric app, featuring an intuitive subscription process, personalized engagement, and user-friendly navigation. Constructed on an AEM/React architecture with a modular

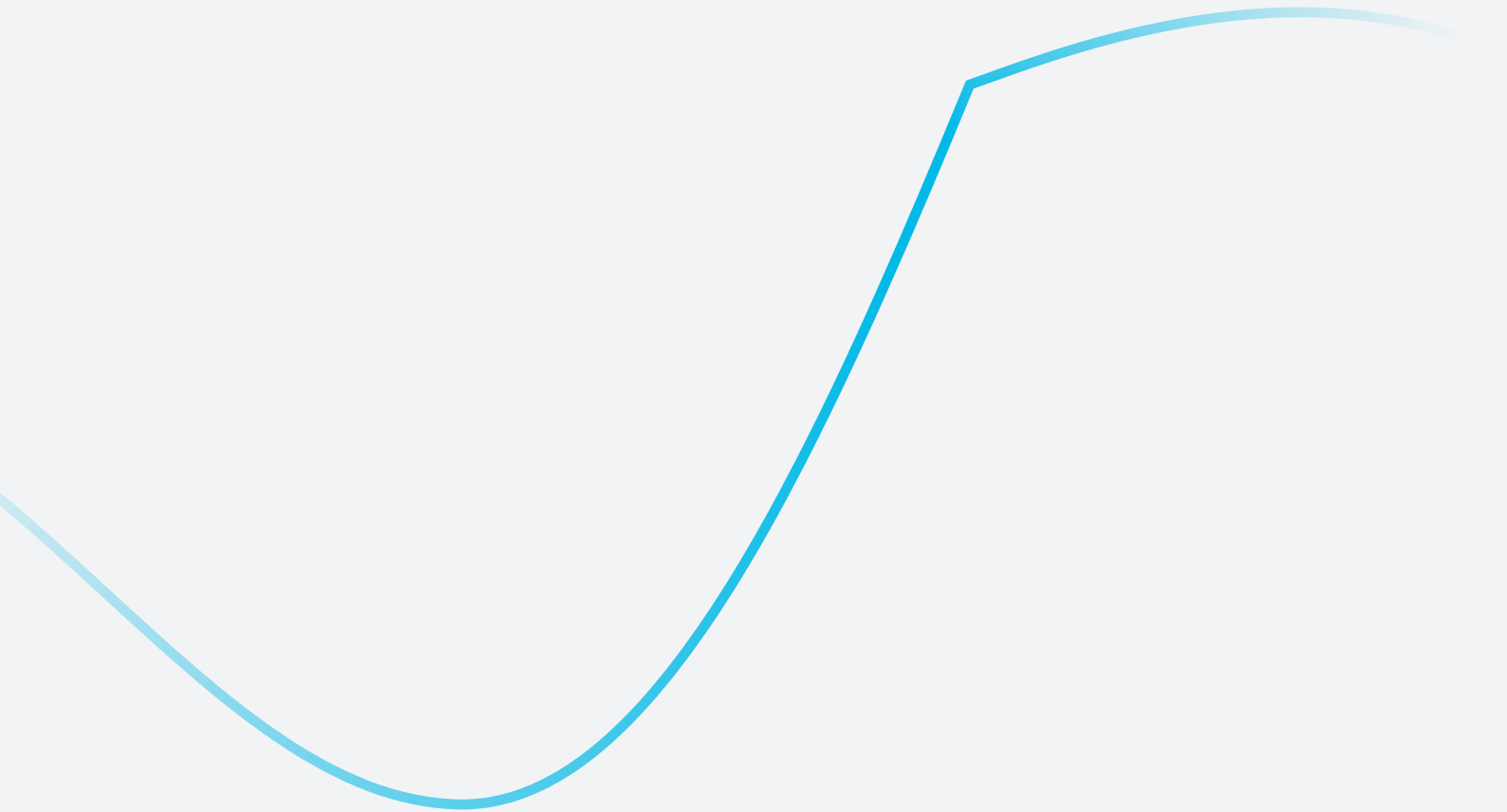
federation framework, it complemented the original structure and empowered over 100 additional content providers to operate independently and maintain their own release cycles.

Engaging users and the competition

The newly redesigned sell-side research platform, which was developed with insights from over 300 global analysts, will enhance user engagement through targeted segmentation and customization. By delivering content that meets the specific needs of its users, it ensures relevance and value. The introduction of unique features tailored to this system will draw users away from competing systems and aggregators. Consequently, the bank is set to benefit from more centralized data management and increased flexibility.

The platform will employ a sophisticated publishing workflow to more effectively cross-sell and upsell offerings, such as research events and analyst consultations. Designed with scalability in mind, it will prepare the bank for future growth and innovation, addressing the evolving demands of the financial services industry.

The initial MVP launch is slated for Q4 2024, representing a key achievement in the bank's digital transformation. The solution will be rolled out to users globally, after which the bank and Capgemini will seek new opportunities to expand the digital ecosystem further.



About Capgemini

Capgemini is a global business and technology transformation partner, helping organizations to accelerate their dual transition to a digital and sustainable world, while creating tangible impact for enterprises and society. It is a responsible and diverse group of 340,000 team members in more than 50 countries. With its strong over 55-year heritage, Capgemini is trusted by its clients to unlock the value of technology to address the entire breadth of their business needs. It delivers end-to-end services and solutions leveraging strengths from strategy and design to engineering, all fueled by its market leading capabilities in AI, cloud and data, combined with its deep industry expertise and partner ecosystem. The Group reported 2023 global revenues of €22.5 billion.

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