



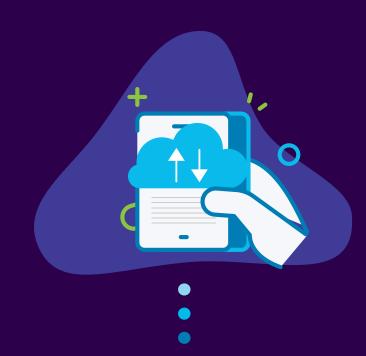
Acting like a fintech: Helping a traditional firm create new business

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

Industry: Investment management Location: North America

Technology and services

- 🔂 SaaS
- Operating model design
- 🔂 Agile-at-scale



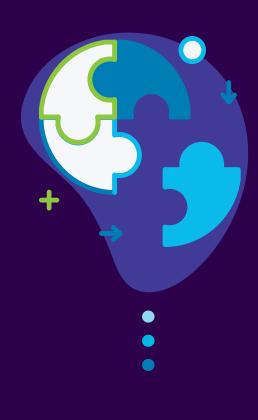


Business need

- 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 wealthmanagement 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

7,**4**

To generate business value, visionary CIOs must transform the technology and operating model simultaneously, entering a new