



# Global Investor Communications Co. goes Mobile.

Benefits from New Revenue Stream, Rapid  
Business Growth



**Microsoft Partner**  
Gold Application Development  
Gold Collaboration and Content



## About the Company

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The client, headquartered in New York, is a 50-year old leading global provider of investor communications and technology-driven solutions to wealth & asset management and capital markets firms that enable multichannel communications, while meeting regulatory requirements. These solutions enable financial institutions to build and enhance trusted relationships, increase revenues, and improve operational efficiency.

## Background

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The client's flagship communication platform offers thousands of well-researched financial planning, wealth management and FINARA (Financial Industry Regulatory Authority) reviewed resources such as articles, illustrations, videos and several interactive calculators to help financial advisors form enduring relationships with their respective customers.

## Business Need

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The existing platform had limited viewership and the client wanted a mobile solution, based on the fact that over 85 percent of users spend their time on their mobile devices.

The world-class native app should open up a new revenue stream, when offered as an add-on product, along with giving them a competitive edge.

Since the client's customers could be using different kinds of mobile devices, the technologies had to cover both iOS and Android platforms.

The client expected the mobile solution to leverage their existing web platform by maximizing common implementations for multiple mobile platforms, and utilize enterprise-class back-end services.

## Solution

- As per client's requirements, the intuitive, user-friendly app would project only required content empowering users to progressively discover on drilling down.
- Based on a comprehensive analysis of online user behavior, the app was designed to react and support short, sudden bursts of customer interaction.
- To increase user engagement the app's 'push notifications' feature, empowered the client to disseminate valuable and personalized information to customers.
- The app was integrated with communication channels (call and SMS) making it easy for users to connect with financial advisers, if required.
- The app was thoroughly tested on actual mobile devices. Additional security, load and performance testing was also undertaken to ensure that the application was defect free, secure, scalable and responsive in real world scenarios.

**“Overall Development Costs Reduced by 35-40%.”**

## Technology

- The client's preferred technology was Microsoft, and therefore, to maintain uniformity, and reduce future dependency, Trigent engineers developed the mobile application on Microsoft Xamarin.
- The team built a multi-tier architecture, suited to Xamarin platform, with presentation code written using Xamarin Android and Xamarin iOS. The middle tier connected to the client's existing software and back-end database.
- Amazon Simple Notification Service helped the client to engage with customers.
- Adobe Analytics was adopted for analytics at the segment level and custom metrics for each page view.
- Trigent's team performed comprehensive testing on actual devices using Xamarin's Test Cloud.

### Technology Stack

- **Technology:** Microsoft Xamarin, Xamarin Android, Xamarin iOS, C#,
- **Servers:** IIS, MS SQLServer
- **Tools:** Xamarin for Visual Studio, Amazon SNS, Adobe Analytics

## Benefits

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- With Trigent's help, the client realized a number of benefits such as revenue growth, reduced costs, and increased customer base.
- The new mobile application helped the client to expand billable channels and increase their revenue.
- With new Omni-channel content delivery and availability across devices, the client experienced substantial growth and market share.
- Through the use of native apps, financial advisors were able to increase the engagement of users, both in terms of content consumption and direct interaction.
- The unified code base for all the devices, combined with automated functional testing helped reduce overall development cost by 35-45%.