



A 'Planned Giving' Company Extends Customer Reach with Hybrid Mobile App



Microsoft Partner
Gold Application Development
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About the Client

The client, headquartered in Massachusetts, supports thousands of customers with expertise and excellence in products and services for charitable gift planning and planned gift administration. The client's software, gift administration services, expert consulting and marketing services support the missions of countless institutions and charitable organizations as well as the firms that serve them.

Business Needs

The client's flagship product, a robust 'planned giving calculations and proposal' software, helps financial advisors to collaborate efficiently with donors by allowing them to calculate, compare and promote planned gifts. However, the product when designed could only support desktops. With an increase in mobile usage, the client saw an opportunity to roll out a tablet version of the product to improve the intimacy and personalized service in the sales process.

Challenges

The client's legacy application, created on outdated technologies, had limited design and usability features. Since the client mainly catered to mature customers, intuitive usability was the main criteria. Secondly, the application had to be modernized in terms of design, features and usability to encourage device-agnostic adoption.

Solution

- Trigent's engineers, to understand customer behavior, conducted an intensive focus group study. Members of the group were presented with a visual guide (wireframe) that represented the skeletal framework of the application. Their behavior when using the wireframe, was recorded and this helped the team to get valuable insights when designing the interface. All the findings were documented, and presented to the client for future reference.
- The application, intended to run on both Android and iOS-based tablets, was built using

HTML5 which offers excellent features such as browser cross-compatibility and mobile optimization. The team combined HTML5 with jQuery for rapid development.

- To ensure that response time was as close as possible to that of a desktop application, the team designed a single page application with pre-loaded functionality.
- To enhance the responsiveness of the app version, Trigent, used 'Telerik Reporting Control' which offers interactive ad-hoc reporting for mobile, web and desktop applications.
- To protect the IP of the application, Trigent ensured that the business logic, i.e. the part of the program that encodes the real-world business rules that determine how data can be created, displayed, stored and changed, be encapsulated in a web service.
- Extensive usability testing was conducted to ensure that the navigation, UI and interface were intuitive and conducive for tablets and other mobile devices.

Technology Stack

- IIS Windows 2012 Server
- Microsoft .Net Framework 4.5
- MS SQL Server 2012
- C#, HTML5, J-Query, Bootstrap
- Telerik Reporting

Benefits

- User adoption increased and the new design and interface received faster acceptance among existing customers.
- With the new Omni-channel content delivery and availability across devices, the client was able to increase market share substantially.
- Through the use of mobile web apps, the client's financial advisors were able to increase engagement with donors, both in terms of content consumption and calculations.
- Unified code base for all the devices, combined with automated functional testing helped reduce overall development cost by 35-45%.