

## CASE STUDY

# Mobile Enablement Helps a Financial Solutions Company Increase Revenue and Gain Market Share

### About the Client

The client, headquartered in Massachusetts, is a market leader providing planned giving software solutions to institutions, foundations and charitable organizations as well as the financial firms that server them to help administer gift annuities, charitable trusts, pooled funds and several other types of planned gifts. The client had been providing the software and managed services to their customers across the nation over 3 decades.

### Business Needs

Client's flagship product was a robust planned giving calculations and proposal software. The software helps financial advisors to collaborate efficiently with the donors by allowing them to calculate, compare and promote planned gifts effortlessly. However, the product was made available only on desktops.

They needed a tablet based version of the product that can be worked in a small group situation, in a personal, close collaboration setting. They wanted to roll out the tablet version to help the sales people build a close connection with donors and reach out to a wider target base by providing easy access to their content and solutions.

### Challenges

Usability design and testing were major challenges. Part of the value proposition was to ensure the existing user base was comfortable using the new interface allowing them to intuitively navigate and a hassle free adoption.

Further, the user-interface was quite ancient and nowhere near to match modern user experience. We had to design interface to suit the needs of elderly donors and make it work among few people across the table situations.

Besides, providing a trendy user experience required a complete revamp of the existing interface which was quite primeval.

The existing architecture also limited the devices on which it can run and the options for updating its interface on a continuous basis.

Lastly, the application was based on ageing technologies, such as C and C++.

### Technology

- ✓ HTML5
- ✓ jQuery
- ✓ Telerik Reporting
- ✓ iOS
- ✓ Android
- ✓ Eclipse

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## Solution

Trigent did an extensive focus group study to understand user behavior. Trigent provided wireframes to the users and recorded their behavior while they were using the wireframes. This study helped us get valuable insights while designing the interface to make user experience that is engaging, intuitive and efficient. All the findings were well documented, recorded and presented to the client.

Extensive usability testing ensured the navigation, UI and interface were appropriate for small screen size of tablets and other mobile devices, and relies on touch interface.

As the solution was intended to run on Android and iOS tablets, HTML5 and jQuery were used to expedite development with a clean look and feel. HTML 5 gave native developers a platform enabling them to build a single application that could run on multiple devices.

Trigent suggested for a single page application where most of the functionality was pre-loaded. The idea behind pre-loading was to reduce dependency of the web client from recurring calls from server.

To enhance the responsiveness of the app, Trigent used “**Telerik Reporting Control**”. It gives out of the box exports to various formats and it has HTML5 viewer which fits nicely with the responsive design.

To protect the IP of the application, Trigent implemented all the business logic in web services.

## Benefits

Trigent’s helped Client realize a number of revenue, cost and technology benefits:

- ❑ The user adoption went smoothly as there was less resistance to the new design and interface
- ❑ The new mobile application helped our client expand billable channels and increase their revenue.
- ❑ With new omni-channel content delivery and availability across devices, our client increased their market share substantially.
- ❑ Through the use of native apps, the financial advisors were able to increase the engagement with the donors, both in terms of the content consumption and calculations.
- ❑ Unified code base for all the devices, combined with automated functional testing helped reduce overall development cost by 35-45%