

Financial Services Firm Case Study

About The Firm

The firm is a large US-based mutual fund investment company consisting of a number of investment teams in a variety of locations throughout the world all under a single roof. This enables the firm to offer specialized expertise for different asset types supported by the resources of a large global firm.

Problem

The firm decided to focus on the following issues to grapple with in becoming more effective at meeting their customers' needs:

- Financial advisors carrying stacks of out-of-date documents when meeting with clients.
- The need to experiment with new sales tools to make financial advisors more effective, with real-time information on their mobile devices.
- Existing development cycles for internal mobile apps were too long.
- The existing capacity for development focused on more visible consumer-facing apps to the detriment of sales-support apps.

Solution

The firm selected the Appery.io platform to accelerate mobile innovation. The Appery.io mobile app platform has continued to provide a steady stream of both customer-facing and internal apps including:

- A mobile app for iOS and Android enabling employees worldwide to access the company's SharePoint system containing the firm's current mutual fund information.
- A tablet app designed to educate investors in emerging markets to facilitate their investments in those emerging countries (e.g., India).

Results

Within 3 months, the firm launched the first mobile app to more than a 300 financial advisors. The specific apps mentioned above produces great results for the firm. The Sharepoint app has enabled the mobilization of the employee base and improved profits and sales. The emerging countries tablet app has produced a significant bump in revenue from business in emerging markets.