

Financial Services Firm

About the Firm

The firm is a UK-based fund investment company consisting of multiple investment teams in locations across the world.

Problem

In order to become more effective at meeting their client's needs, the firm wanted to focus on the following topics:

- Making sure that financial advisors always had the most up-to-date documents while meeting with clients.
- Experimenting with new sales tools to make financial advisors more effective, with real-time information on their mobile devices.

Further, their existing development cycles for internal mobile apps was too long, and the capacity for development focused on more visible consumer-facing apps, rather to the detriment of sales-support apps.

Solution

The club turned to Appery.io partner, Idea Labz, a mobile development company that serves customers in EMEA and APAC. 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 internal system containing the firm's current fund information.
- A tablet app designed to educate investors in emerging markets to facilitate their investments.

Results

Within 3 months, the firm launched the first mobile app to all its advisors, producing great results for the firm. The integrated app has enabled the mobilization of the employee base, allowing the firm to better serve their customers, and make sure that their information is always up-to-date.

"With Idea Labz and Appery.io, we were able to build an eco-system for all our advisors with a custom app integrated with our existing core system. Thanks to the cross-platform approach, Idea Labz and Appery.io enabled us to easily on-board our advisors without any infrastructure deployment, maintenance or training, something that other vendors did not offer."

-Director and Senior Partner at the Firm