

## Personalized Premium Content to Customer: Innovative Solution for Wealth Managers to Deepen Client Relationships

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### Overview

#### Client Profile

*Client is one of the most reputed publishers of financial information in the world with a tradition of pioneering content monetization through highly differentiated products and services.*

#### Business Scenario

*Client was facing saturation in content monetization through Print and Online Channels. Their customer – wealth managers were seeking a unique content offering that would significantly enhance their services. Client envisaged an innovative product tailored to the customer servicing needs of the wealth managers..*

#### The Solution

*Infosys designed and developed an online product that delivers configurable and personalized premium content through a set of web services and a web portal.*

Infosys partnered with a large financial information publisher to create a unique content based product leveraging client's sources of financial content and access to premium content from other market leading sources. This solution helped wealth managers to build client loyalty and grow their wallet share.

## Business Scenario

The traditional content monetization models of the client were saturating and not in line with the growth aspirations of the business. Wealth Managers needed content that directly related to their portfolio of investments and is relevant to specific interests of their customers.

A product that would allow them to personalize communication to increase client loyalty and grow assets portfolio was critical to their success.

## Solution

Infosys conceptualized the solution to be delivered in 2 phases to suitably target appropriate client's customer segments based on expected revenue potential. Infosys leveraged its vast repository of tools, re-usable components, frameworks to deliver the solution ahead of schedule. This phased rollout approach enabled faster time to market and shorten investment recovery cycle for client.

### Phase I

This phase involved developing flexible industry-standard web services. This enabled large financial firms leverage the value-added services within their enterprise-wide client service applications.

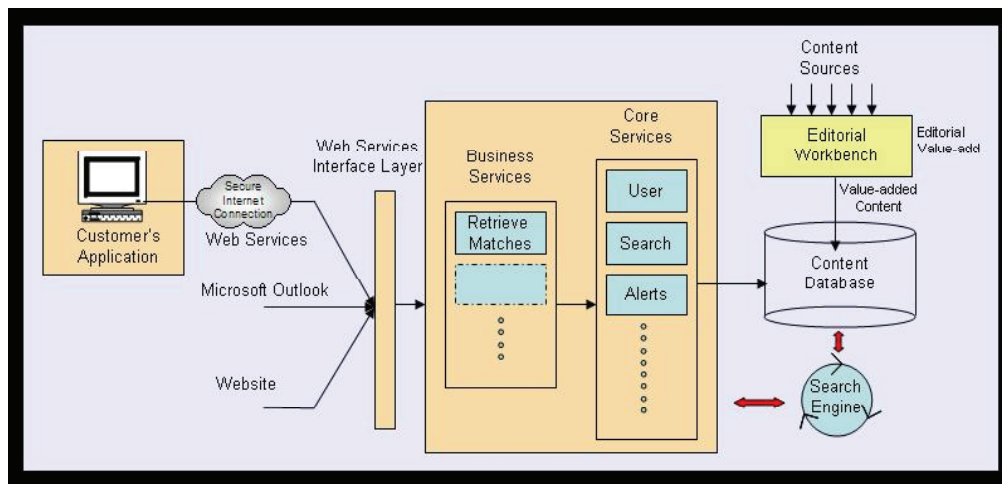
Web services components are seamlessly integrated into the wealth manager's operating environment such as CRM applications, portfolio management system. This would enable wealth managers to develop profiles of individual clients and return personalized information for each client. Using this information, wealth manager builds loyalty through initiating discussions around client's interest areas and takes investment decisions on behalf of the client.

### Phase 2

The second phase of the solution was to provide a feature-rich content website leveraging the unique web-services solution. This was conceptualized to enable access to the product even when the wealth managers are outside the confines of their operating environment

The website provides unique features like the client match rollover, customized alerts, advanced search and briefcase. The solution is designed to be extensible to a multitude of delivery channels.

## Technology



- Web Services: RESTful Web Services supporting RSS, XML, NewsML feeds
- Website: Web 2.0 architecture using object oriented JavaScript based Rich UI Widgets (RUW) driven by AJAX. Supports IE and Firefox browsers.
- Application Server: IBM Web Sphere 6.0
- Database Server: Oracle 10g RAC
- Search Server: Verity
- Other Technologies: RSS, Struts, Hibernate, Spring Framework, JMS, AJAX, JUnit, Quartz Framework

## Benefits

- Enhance Content Usage: The solution enabled better content monetization and ease of content consumption
- Faster Time to Market: The phased approach enabled faster deployment and ROI
- Scalability: The solution was architected and designed to cater to rapid growth of customer base



### About Infosys

Infosys provides its clients with business and technology consulting services that deliver measurable business value to help you build tomorrow's enterprise. Through a well-integrated end-to-end range of consulting, technology, engineering and outsourcing, Infosys clients derive the business value they've always been requiring from enterprise transformations. Our extensive research teams, including the award-winning SET Labs, ensure Infosys solutions are always cutting-edge and relevant. Our high investment in training – over 10,000 graduates a year pass through our Mysore campus, the world's largest corporate university – ensures our people stay best-in-class. Infosys (NASDAQ:INFY) also believes in giving back to the communities with scholarships, libraries, schools, and many other fields through the Infosys Foundation.

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