

Case Study



Client Profile

Organization

Canadian wealth management provider

Size

Manages over \$11 billion in assets

Industry

Financial services

This client provides investment and insurance services to credit unions and independent investment companies throughout Canada.

CURRENT STATE REVIEW

Business Needs

The client was using multiple Web-based technologies to provide services to its clients, partners and employees. These technologies were introduced at various times, with little reference to any overarching business or technology strategies. This resulted in:

- Internal inefficiencies and infrastructural weaknesses
- Inconsistent online experiences for customers
- Insufficient maintenance of existing systems

Solution

Knowledgetech conducted a review of the client's Websites, intranet and extranet, as well as the databases and applications supporting these technologies. The results were delivered in a detailed report, which provided information on (and graphical representations of):

- What systems were in use and how they were used
- Who used, managed and maintained these systems
- How these systems were connected and interdependent

Benefits

- Gained deep insight into the size, complexity and specific nature of the organization's Web technology portfolio
- Established a meaningful basis for the creation of a road map outlining how the organization could:
 - Update and standardize its online presence
 - Deploy a new, unified website platform, aligned with its key organizational goals



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