



SUCCESS STORY



Transformation Personalized

J2EE Personalization Application

When organizations struggle to personalize the customer experience across different customer segments, market share can start to decline. Failure to address this struggle can result in decreasing revenue, unsatisfied customers on all fronts and a morale issue among sales people just trying to keep everything together.



Large Investment Management
Company

Location
Pittsburgh, PA

Type
Financial Services

Technology

- IBM WebSphere Application Server 4.0.4
- IBM WebSphere Studio Application Developer 4.0.3
- IBM WebSphere Personalization Server 4.1
- Interwoven TeamSite
- Interwoven OpenDeploy
- Interwoven OpenDeploy, XML/XSL
- Open Source Development Tools (Struts, ANT, log4J)
- Windows 2000 Server

THE CUSTOMER

The client is a large financial services company headquartered in Pittsburgh, Pennsylvania that manages over \$360 billion dollars in customer assets. The client offers over 130 different types of mutual funds and serves a diverse range of customers which include banks, broker-dealers, trust departments, investment companies, charitable organizations and pension plans. Services are offered through approximately 4700 client firms. The company offers flexible investing strategies to meet the needs of a variety of different customers.

THE CHALLENGE

- Losing business opportunities to smaller, faster competitors offering a variety of online features.
- Failing to meet customer demands in a timely manner.
- Inability to integrate existing event tracking and file management application with the web content management applications.
- No internal skill base to adopt J2EE platforms.

The client's IT organization was struggling with a variety of problems that their sales department needed answers for. It had become apparent that not having a unique "web address" where all types of clients (commercial and private investors alike) could actively manage and check the health of their portfolio was significantly contributing to a decline in market share. In addition, the discussions about an upcoming acquisition and the resulting integration challenges that were keeping IT teams occupied and unavailable to address the sales team's concern.

The decreasing revenue trend was a concern and likely to continue if the IT organization didn't address the personalization environment within a reasonable time frame.

THE SOLUTION

Visvero proposed a project model that would include the design and construction of a reusable framework for personalized content access using WebSphere Personalization Server, XML and Interwoven metadata.

Other features of the application implementation included dynamic access to the client's product data via IBM Extended Search, integration with WebSphere Site Analyzer for marketing analysis, and linking the client's LiveLink document management system with the Interwoven TeamSite product.

As an official launch for the project, the Visvero team of experts conducted a workshop to jointly define and prioritize the business and technical requirements for the project with business as well as IT department management. Following the workshop, Visvero constructed an end-to-end proof-of-concept portal to validate technologies and requirements as well as establish a framework for the full implementation of the portal.

The implementation phase of the project included dynamic access to the client's product data via IBM Extended Search, integration with WebSphere Site Analyzer for marketing analysis, and linking the client's LiveLink document management system with the Interwoven TeamSite product.

THE RESULTS

Robust Architecture:

The client now has a robust architecture and reusable WebSphere, J2EE and Web Content Management environment that can be used for the extension of the portal as well as future web applications.

Speed to Market:

This environment includes a highly available, secure and high-performance infrastructure, core reusable components for content access and personalization and development, build, test and turnover processes for future web application construction.

New Opportunities:

Finally, the environment provides the opportunity for the syndication of content or other data using Web Services and other portal data providers.

The project was delivered in 4 months time and the integration model allowed the client to extend the lifecycle of the existing application by three years, saving \$3 million and making that money available for other strategic initiatives and capital acquisition.



4 Month

Project Delivery Time

\$3 Million in Savings

Reduced Cost
of New Developments

ABOUT VISVERO

Visvero Inc. is a Business Intelligence Solutions Integration company headquartered in Pittsburgh, Pennsylvania. The company was spun off as a separate business unit from Datavibes, Inc. where the team was providing Business Intelligence services since 2003.

While providing business intelligence services under the Datavibes umbrella, the core team noticed a recurring challenge for clients was that their performance enhancement projects were becoming huge money pits, with varying degrees of success and consultants billing time to ongoing enhancements — never really closing out on any BI project implementation.

The Visvero team seeks to change this trend. Our goal with any BI project is to allow organizations to say,

“Business Intelligence ... Done.”

WHAT WE DO

Specializing in data visualization and integration allows our clients to have a consistent Vision (VIS) of Truth (VERO) across the enterprise.

The Visvero team is diverse — consisting of business consultants, technology experts and tight partnerships with software technology developers. This enables us to deliver the best Business Intelligence tools and thinking to our clients and track the progress and sources of variances when needed.

While many Business Intelligence consultants only deal with full-life cycle projects, Visvero has developed an understanding that every organization's needs are different, and thus our services have evolved to fit our client's needs, rather than an arbitrary definition of a BI project.

Our services include specialties in the Planning, Implementation and Adoption phases of Business Intelligence projects.

HOW WE HELP: FINANCIAL SERVICES

From managing risks to managing under uncertainty, Visvero has helped banks and insurance companies to survive and thrive in both of these scenarios. Our extensive domain expertise in the financial services industry gives us an ability to provide clients with best practices so that they can be agile and customer-focused even in the slowest markets.

By developing web portals, balanced scorecards, executive dashboards, heat charts and integrated reporting, Visvero provides key financial services executives with the ability to get instant access to relevant information across various data assets in the enterprise. We have worked with both large Fortune 500 companies as well as mid-sized and small enterprises.



Contact us today at info@visvero.com or visit www.visvero.com for more information