

DIGITAL INVESTMENT MANAGEMENT

AT A GLANCE

CHALLENGES

- Customers unable to manage investments online
- Complex systems ecosystem involving vendor platform

BENEFITS

- Digital portal delivered enabling self-service
- Project completed on time, to scope and \$300K under budget



"For over 20 years I've helped household name organisations across Australasia and the UK make smarter decisions, faster, and drive change.

Work with me to get clarity and consensus on a pragmatic way forward."

REBECCA SPEIRS

Adapt & Improve Consulting

COMPANY OBJECTIVES

A revamp of an investor portal to enable self-service investment management.

Initial phase scope included viewing holdings, performance-related data, and transaction history. Subsequent phases included share trading capability and a strategic review of onboarding

APPROACH DESIGNED

- Facilitating collaborative customer journey mapping to inform scope and priorities
- Definition and agreement on a set of baselined, prioritised business requirements
- Agile delivery approach designed and agreed with vendor delivery partner
- Scoping and facilitating agreement on a library of APIs with third-party wealth platform vendor to support self-service functionality

RESULTS DELIVERED

Digital portal delivered on time, to scope and \$300K under budget.

The sponsor noted the expertise I brought to scoping the project was fundamental to it delivering on time, to scope and under budget:

"This was the best Agile project I have seen at Craigs"

Stephen Jonas, Head of Client Services