Convertigo and Adobe Team
to Deliver Customer Value through Dynamic Business Applications

Introducing User-centric Applications for Financial Services

The explosion of the consumer Web has forever changed how people think of computing and software and how applications need to be built. This shift – which could be described as moving from a system-centric to user-centric – orientation is arguably one of the most important changes to computing since the advent of the personal computer. Website visitors benefit from information that has been freed from its proprietary databases and transaction systems and aggregated and presented in ways that map to the way users need to view and interact with information.

Until now, financial services companies have been trapped in the old paradigm – where system-centric design rules the IT landscape. Resulting from years of major industry consolidation, many financial services firms are burdened with legacy systems inherited from various acquisitions. Core data is highly transactional, complex, stored in multiple silos, and processed in batch mode not real-time.

Rather than force business users to wade through multiple applications and dozens of screens - there is a better way to give them exactly what they need to serve customers and make more informed decisions. Through an intuitive composite interface with a view of relevant information designed with them in mind.

Convertigo and Adobe have joined forces to deliver a revolutionary solution to the financial services industry. By coupling the Convertigo Enterprise Mashup Server™ and the LiveCycle® and Mosaic products from Adobe, Financial Services companies can deliver breakthrough user-centric composite applications that are significantly more productive.

Real-World Case Study

One of the world's largest Financial Services institutions recently merged its brokerage arm with that of another large, multi-national firm's wealth management group – creating a division with more than 18,000 brokers, managing well over a trillion dollars in client assets.

This new group handles millions of calls per month and requires quick and easy access to relevant customer information – housed in over 30 unique applications – to perform their vital customer-facing operations. They have to access multiple screens to find the relevant data and calls are often forwarded to different departments and customer satisfaction suffers because they can't reolve issues quickly.

This is because nearly all of the information they need is locked away in applications built on mainframes without direct database access or in newer apps developed without an API or Web Services; this information was never intended to be shared. The company faced enormous development costs, major business disruption, and a multi-year roadmap for delivery of a new application that would integrate these disparate systems. They had to find another way. Employees and customers depend on these internal business applications - often 24x7- which doesn't allow downtime for lengthy migration projects

For this massive-scale application for the customer service call center agents, the financial institution held the vision of using a Web Mashup model, similar to how the most popular websites aggregate and present data to users. Instead of just using plain old web data, they wanted to integrate information from 30 legacy applications to provide the enterprise data needed for driving customer interactions.

They selected Adobe, Convertigo and a system integration partner, i-Cubed, to bring this vision to reality. Now, these call center agents will get a rich internet-like experience with the information they need to do their jobs. And, the IT organization will have a seamless and effortless way to gather back-end system data and processes, mix them with web resources, and deploy them as dynamic composite applications.

With the new rich composite application in place, brokers will be able select, combine, and display information that is currently residing in dozens of legacy systems and render a 360-degree view of all the customers' reference data. This data includes bank accounts, net worth and assets, previous transactions, customer service interactions, complete product portfolio, and much more. This will make agents more productive, shorten call time, reduce support costs and increase customer satisfaction.

The first version of the new application is expected to be deployed to approximately 14,000 call centers agents and there are plans to scale to 50,000 users, accessing roughly 200 applications.

Convertigo and Adobe's technologies combine to solve the toughest information challenges and provide an optimal delivery method to bridge the gap between legacy systems and rich internet applications.

- Convertigo provides quick and easy access to legacy, web data, and native business processes.
- Adobe creates new ways to engage the user with easy, intuitive and graphically rich applications.

The combined solution:

- Presents business-critical information to users in a dynamic, intuitive way
- Allows for seamless data access to and from a wide variety of data sources
- Significantly reduces project costs and deployment time
- Minimizes business disruption

Composite Apps = Pick, Mix & Deploy

The key is "composing" business solutions from available business resources, not coding them. Composite rich internet applications, or mashups, are a way to dynamically assemble existing visual components (Adobe refers to these as tiles) and services together in order to quickly deliver new business functionalities. It is then possible to deliver tailored views to specific categories of users who get all of the data they need within a single application.

Convertigo enables easy access to legacy mainframe and Web applications that only expose unstructured data in screens. Convertigo generates Web Services or tiles directly from these screens. By accessing existing applications from the user interface, Convertigo inherits all of the existing business logic, across all layers – saving enormous development time and expense.

By combining this unlocked data with a rich user-interface the resulting library of web services and tiles are then available to be customized, combined, and redeployed to suit their individual and departmental needs. They can pick their data, mix it with other data, and deploy the resulting applications.

This user-centric approach through composite applications can help financial services organizations open up new markets, win new customers, improve customer satisfaction, and increase business efficiencies.

Faster, Easier Deployment

Using a traditional system-centric paradigm, the internal IT complexities and costs required to decouple, unravel, and convert legacy business applications to new rich internet applications is often too enormous and risky to justify. As a result, information remains fragmented and decentralized across the organization.

Just getting at this data - from applications (both legacy and web) without APIs or those without existing web services - and converting it to usable business components - would have been extremely difficult and cost prohibitive using traditional development scenarios. For this Financial Services institution, and most others, given the complexities of their IT environments and the sheer number of systems, attempting to do this manually would have resulted in staggering investment, dozens of person-years of development and significant business disruption.

Now, dynamic business applications can be built and deployed at a fraction of the time and cost of traditional integration and development methods. Expensive development time is dramatically reduced as they no longer need to manually access proprietary and legacy information stored in multiple programming languages in disparate systems. Application logic is reused, and a library of reusable components becomes available for future projects. Dynamic composite applications can now be deployed in months instead of years with significantly less cost and complexity.

To learn more, please contact us or visit us at **www.convertigo.com**

About Convertigo

Convertigo is a global software company that improves data sharing through dynamic composite applications. We improve the business agility needed to innovate, transact, streamline processes, and improve customer satisfaction for enterprise and SMB customers. Founded in 1994, over 300 customers rely on Convertigo to solve critical data access and delivery challenges.

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