

case study –

Cloud-based FinTech solutions provider modernizes SaaS platform with Resolute Software

Angular

Microsoft Azure Active Directory

Data Augmentation

Company

Cloud-based FinTech
Solutions Provider

Customer since

2021

Goals

- ✓ Modernize the outdated design and UI of its SaaS-based platform
- ✓ Provide advanced capabilities for data security and visualization
- ✓ Maintain the core functionality of the platform while incorporating cutting-edge technologies to respond to clients' evolving needs

Insights and answers for asset managers

A small but growing cloud-based FinTech company that provides analytics to asset managers recently **engaged Resolute to help modernize** its client software platform.

In business for 10 years with offices in Europe and North America, the customer works with some of the world's leading financial institutions, **empowering fund managers to drive better investments.**

The customer's software is used by analysts, portfolio managers, risk managers, and client relationship managers – to understand and explain to their own clients the nature of their investment results.

The goal

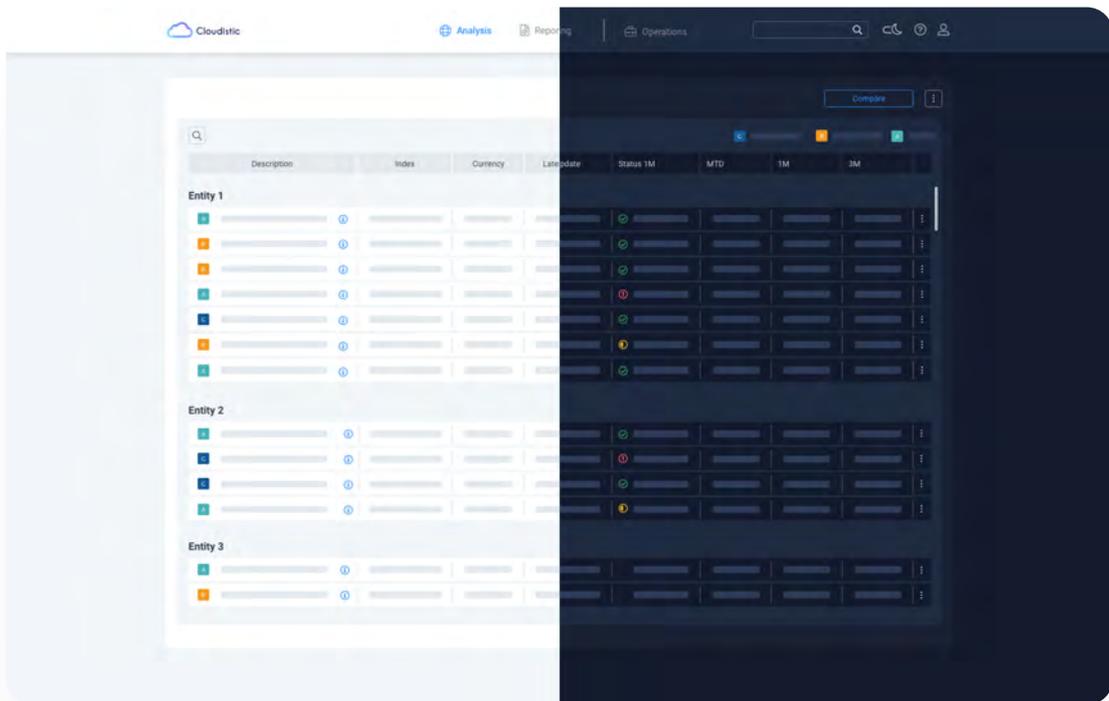


Our goal was to redesign and modernize our customer's platform, while making the interface more responsive. The platform needed to be more flexible and extensible.

the challenge –

Updating an outdated UI to provide high-quality data visualizations

The software platform was built in 2012, so the user interface was outdated. Clients were requesting better visual representations of the data and analytics, and there was concern that they would associate the outdated UI with the quality of the data models and the accuracy of the results the platform provided.



“That’s not an association we wanted our clients to have. We needed to provide a more modern look and feel that would match the quality of the data models we provide,” the Head of Product said.

the challenge –

After evaluating four providers in October 2021, our client chose Resolute.



“Resolute was the only company that possessed a good combination of strong technical knowledge and experience, an attractive price point, and a solid understanding of what we were looking to achieve,” he said.

“While the other companies had one or two of these qualities, Resolute had them all.”

What they liked best was that Resolute’s approach aligned with their own corporate culture.



“The idea of UI modernization resonated with us, because we knew our frontend needed a refresh. With Resolute, we weren’t just getting the development power, we were getting design expertise, as well.”

Improved user experience and performance in 5 months

Over the next five months, Resolute's team of four delivered the project in three phases:

1

Design

The design phase took roughly six weeks, during which time Resolute redesigned the website's look and feel, and improved the navigation.

2

Development

After the design was completed, Resolute initiated the development phase, implementing the new pages to modernize the SaaS application.

3

Testing

Once development and implementation was complete, Resolute performed extensive testing to ensure proper operation, then handed the project over to the company's internal team.

Throughout all three phases, Resolute held weekly calls and planning sessions, as well as individual sessions with various teams to collaborate on specific issues.

All team members were constantly in touch on Microsoft Teams, which enabled everyone to work closely and collaborate effectively throughout the project.

The new frontend UI is written in Angular

Resolute upgraded the platform's control suite from an outdated set of controls delivered by a third-party vendor to a suite based on Angular. The platform leverages a proprietary API to connect to the backend SaaS, providing a more stable architecture and greater flexibility to accommodate multiple clients' use cases and seamless onboarding.



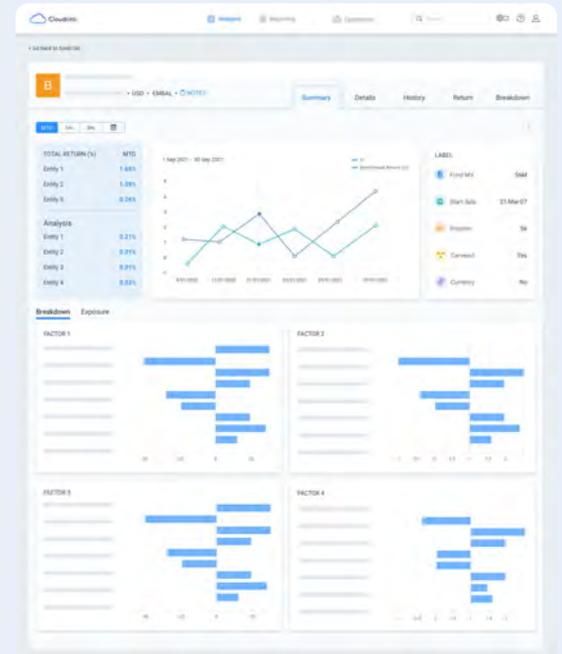
Another outcome of the project was a stronger authentication system, which was not originally in the project specifications.

After evaluating multiple leading technology options, Resolute proposed and implemented cloud-based user authentication and authorization using Microsoft Azure Active Directory.

This enabled secure, standards-compliant user management for the customer's digital product, to help them meet today's demanding security requirements. Through these upgrades, the platform's UI is more visually appealing, and the back-end architecture is able to meet the customer's evolving needs.

Unmasking functionality

Another key feature that Resolute implemented was the **“unmasking” functionality**, which enables clients to dynamically augment (or “unmask”) certain pieces of data on the fly, such as a customer’s name, address or phone number – **anything that constitutes sensitive, client-specific data** that is injected into the application from external data sources.



To enable this functionality, Resolute designed a flexible server architecture for mocking external data, enabling the customer to create virtual servers that mimic clients' servers. This approach provided a **high-security environment for client data** rendered on a screen during the modeling process.

“Efficient data exploration and data augmentation on the fly”

Clients can reveal data to certain entities on an as-needed basis and maintain complete control. All other users – even members of the customer’s Support team – see only the masked identifiers.

Rapid time-to-market with an improved, modern experience



Resolute provided critical UX/UI design capabilities that the customer was missing in-house, as well as the ability to complete the modernization project in a compressed time frame. Initial feedback from their clients has been extremely positive.

While the functionality of the platform remained largely the same as it was prior to the customer engaging with Resolute, **the modernized UI significantly improves the user experience and gives them a competitive edge.**

With Resolute's help, they can now leverage the latest technologies to respond to client requests for updated data visualizations while maintaining the core functionality of their platform.

In the coming months, the customer will enlist Resolute's help in updating the platform's Control Center, so that new calculations and data can be assimilated and processed more efficiently.

These upgrades will be internally facing and designed to improve the experience for internal users.



Clutch

"Collaboration was extremely effective, and we were able to **achieve all of our goals** on-time and on-budget. We're happy we found them, and confident that we'll work with them again."

Let's talk about your technology requirements.

Get in touch

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Deloitte.

Company to
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Fast 50



Business
Professional
Services

Clutch ★★★★★

People First
Company Award
2020 | 2021 | 2022

