



**zensar**

# Streamlining Processes for Success With Zensar's Consulting-led Engagement for a Global FinTech Leader

 **Case Study**

An  **RPG** Company





## Overview

### Revamping operations for streamlined processes

The client is a leading provider of investor communications and technology-driven solutions for wealth and asset management and capital markets firms based in the North America and Europe.. The client was looking for a comprehensive front-to-back-office solution for its wealth management platform, aiming to transform existing systems across technology, processes, and personnel management. Zensar provided extensive consulting-led engagement services, including strengthening the wealth management platform, domain consulting for distributed ledger repo platform, integrated fixed-income trading platform, and customized post-trade and investor communications solutions that helped the client revamp its operations.



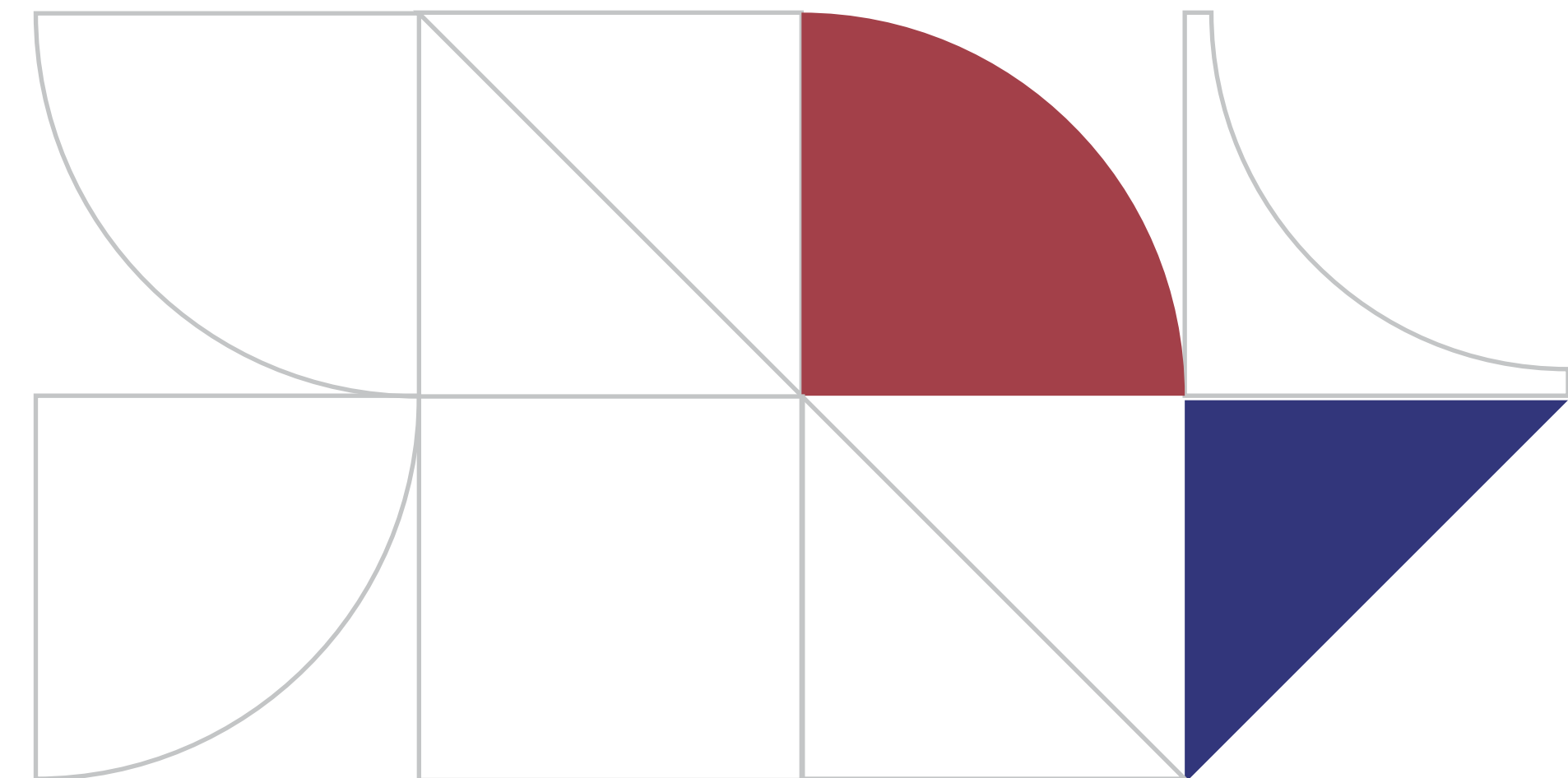
## Challenges

### Addressing system challenges and transforming wealth management

The client was facing several challenges with its existing system while seeking a front-to-back-office solution for its wealth management platform. These challenges included limitations in enabling multiple account opening and maintenance, a poor user experience for financial advisors, and a lack of scalability and customization options to meet client needs.

In addition, specific challenges related to the distributed ledger repo (DLR) involved enhancing the system based on client requirements and identifying potential use cases for distributed ledger technology (DLT) in capital markets. Furthermore, the International post-trade processing system for clearing & settlement required improving back-office function capabilities and assisting the development and QA team in implementing bespoke and generic features.

The payment-as-a-service initiative also involved defining the right minimum viable product features, pricing them appropriately, and bundling use cases and technology into a streamlined PaaS offering.





## Solution

Revolutionizing wealth management and capital markets platform

Zensar's consulting-led engagement brought a transformative solution for the client's wealth management and capital markets needs. For wealth management, we provided an industry perspective to strengthen the platform and increase domain/functional awareness within the engineering team. In capital markets, we became a key partner for the strategic payment-as-a-service initiative and offered domain consulting for an innovative DLR platform, enabling token issuance, rehypothecation, and settlement and clearing leveraging DLT.

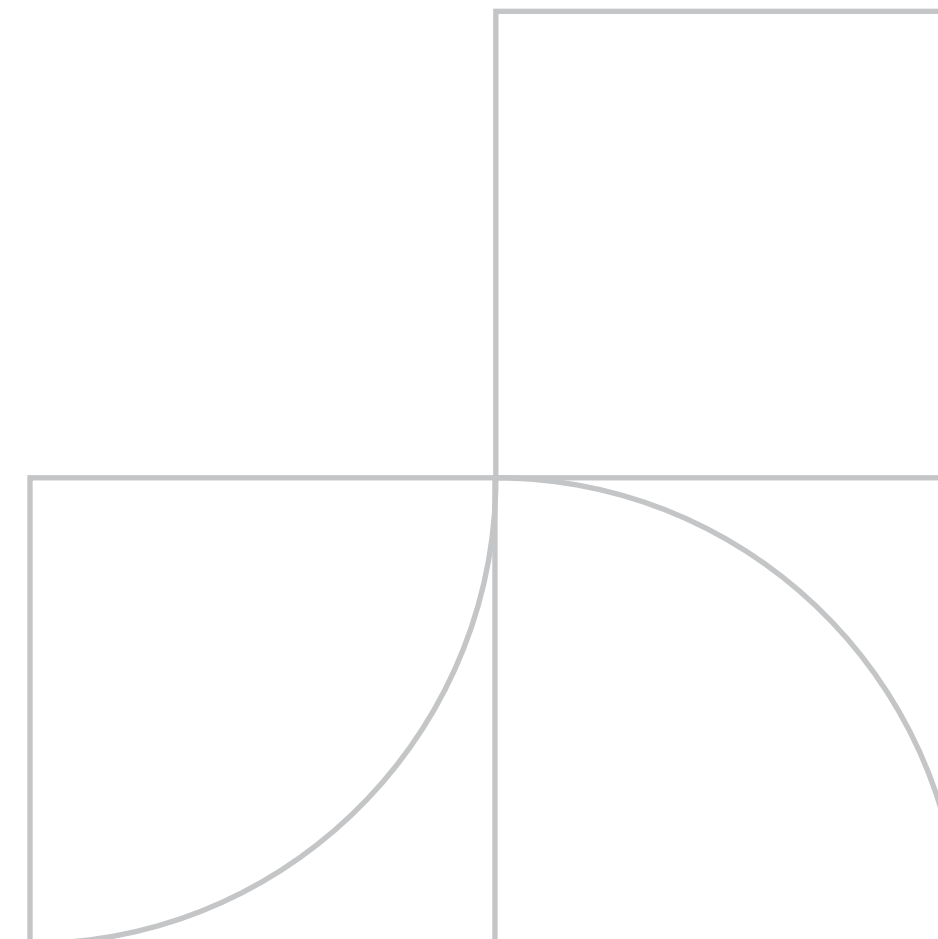
Additionally, we integrated a fixed-income trading platform with external systems to resolve settlement failures. Through their product engineering expertise, our experts helped the client develop a next-generation wealth management platform and tailored post-trade processing solutions for asset managers and broker-dealers, handling tasks such as trade & post-trade processing, record-keeping, and compliance. Furthermore, we enhanced processing efficiency for investor communications and enabled virtual shareholder meetings for proxy voting.



## Impact

Enabling real-time settlement and operational efficiency

Zensar's transformative solutions delivered a range of significant benefits for the client, including facilitating real-time settlement, reducing operational risk, and optimizing costs. Process efficiency was improved through increased liquidity and faster settlement processes. Our experts also devised an effective go-to-market strategy for key products, expanding into new geographies. Additionally, the onboarding process was optimized, leading to quicker turnaround times for client onboarding. Financial advisor productivity saw a significant uptick owing to efficient automation, allowing for streamlined workflows and improved efficiency in day-to-day tasks.





At Zensar, we're 'experience-led everything.' We are committed to conceptualizing, designing, engineering, marketing, and managing digital solutions and experiences for over 145 leading enterprises. Using our 3Es of experience, engineering, and engagement, we harness the power of technology, creativity, and insight to deliver impact.

Part of the \$4.8 billion RPG Group, we are headquartered in Pune, India. Our 10,000+ employees work across 30+ locations worldwide, including Milpitas, Seattle, Princeton, Cape Town, London, Zurich, Singapore, and Mexico City.

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