## Problem Definition

### Case Study

The client offers an “idea-driven” investment solution. Relevant investment products are grouped together into what they call “ideas”. These ideas are provided by a Fund Administrator, they are then reviewed and suggested to the appropriate customer by a Relationship Manager.

The criteria for what products go into an idea are certain attributes of the product, such as regions, currencies, industry sector, etc., or a combination thereof. An example of an existing idea is renewable energy investments in North America and Europe, showing how these criteria are grouped together to create a suite of relevant investments.

### Problem Definition

The current system is email-based, so the Fund Administrators are emailing ideas to the Relationship Managers. Therefore, the Relationship Managers would have to review an idea, look up clients manually, and then make a decision as to whether or not the client is suitable. For cases in which they are not suitable, this is wasted time, and therefore lost potential revenue.

### Proposed Solution

The process and data being available in a single hub would make the overall process much more efficient, resulting in increased revenue.

A Windows Forms based application utilising an SQLite backend would allow a UI-based user experience for the company’s clients, Relationship Managers and Fund Administrators. Allowing the Fund Administrator to upload ideas, Relationship Managers to access those ideas and the clients to create the recommendations, and the client to view those recommendations, all in one application.