



Sapient Advisors

Case Study:

Reimagining Credit-Vision

A Case Study on helping a startup go corporate

How Two Design Sprints Reshaped an Acquired Fintech Product into a Corporate-Ready Platform

Background

In December 2020, Alter Domus, a Luxembourg-based specialist fund administrator, acquired Credit-Vision, a London-based fintech recognized for its ability to extract financial data from issuers' reports, normalize it into a standard chart of accounts, and deliver it in a clean, structured format.

Credit-Vision's integrated SaaS and managed data service streamlined operations throughout the credit cycle. Post-acquisition, the challenge shifted: **how to scale the product for enterprise clients while elevating its brand and user experience to corporate standards.**

Market Context

Private credit teams faced mounting pressure to monitor larger portfolios with more frequent reporting. Analysts often had to:

- Track dozens of portfolio company data rooms
- Download PDFs and manually transfer figures into credit models
- Work with outdated, error-prone processes

This reduced both **accuracy** and **confidence** in credit risk assessments. Credit-Vision had solved many of these pain points, but to reach its full potential it needed to transition from **functional** to **enterprise-ready**.

The Vision

Paolo Malaguti, Credit-Vision's founder and a former credit analyst, envisioned a more unified, robust platform—internally dubbed **Project CVX** by **Zaid Marji**, Head of Technology, Data & Analytics. **Sandy McCarron**, Head of Team Operations and PMO, organized the team, developed the program, and acted as facilitator.

To merge two teams into one shared mission, the journey began with a **design sprint**.

Design Sprint One: Aligning Teams and Setting the Vision

Goal: Build trust, unify the product vision, and redefine the roadmap around client priorities.

- Conducted a **five-day collaborative Design Sprint** tailored for team integration.
- Involved the original Credit-Vision team to ensure buy-in and preserve institutional knowledge. As well as including the team in the future product vision.
- Identified the **Portfolio Dashboard** as the flagship feature—giving at-a-glance asset-level performance and reducing spreadsheet dependency.
- Established a **design system, component library, and data visualization framework** to replace generic Material UI with a **distinctive, corporate-grade identity**. Became the basis design system for additional product suites across AD.
- Enabled consistent, reusable components for faster development and premium presentation.

Design Sprint Two: Balancing Analyst Flexibility with New Possibilities

Goal: Enhance functionality while respecting analyst workflows.

- Addressed the tension between **in-platform tools** and **analyst autonomy** in Excel.
- Ran in early 2024, with AI just entering industry conversations.
- Prototyped subtle **AI enhancements** to test readiness without overcommitting.
- Involved the **Quant team** to experiment with advanced analytics and performance signals.
- Tested the **auto-generated credit memo**—a high-demand feature that every surveyed client was exploring internally.

Outcome: Validation of demand for memo automation, confirming the value of offering it directly within the platform.

Results

- **Elevated Product Presentation:** Distinct corporate-grade visuals, consistent with the Data & Analytics product suite.
- **Feature Evolution with Flexibility:** Enterprise scalability without restricting analyst autonomy.

- **Early AI Readiness:** Validated demand for AI features, opening strategic client discussions.
 - **Stronger Team Integration:** Accelerated development and cultural alignment post-acquisition.
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Conclusion

The CVX initiative shows how **human-centered design, strategic integration, and visual polish** can transform an acquired startup product into a secure, scalable, enterprise-ready platform.

By blending flexible design systems with AI experimentation, Credit-Vision is positioned to meet the evolving demands of private credit teams—delivering with **confidence, clarity, and professionalism**.