**NT – Web App to enable seamless Charity Transaction Management Experience for banking institutions managing $1.5 trillion in assets.**

**Business Challenge:**

* Our client – A fortune 500 banking institution manages $1.5 trillion in assets and provides charity management services to end users through its legacy desktop application
* This legacy application was desktop-only and couldn’t be accessed using a web browser thus wasn’t supported on mobile platforms, tablets and iOS devices
* Furthermore, being a desktop-only application, this made it extremely difficult for our client to manage complaints received from the customer and to diagnose corresponding technical and financial issues
* The users of this application expressed their dissatisfaction through an array of complaints through customer service portals.

**Business Requirements:**

* With a dissatisfied user base in 30+ countries utilizing our client’s Charity Trust Management platform, our client needed a modern solution that could address this challenge and the pain points of their global customers
* Our client needed a team of consultants who could address the following requirements
  + Design a charity trust management application such that it can be accessed from both desktop and mobile devices
  + Enable cross-platform compatibility (Desktop, Android, iOS)
  + Ensure the solution is compliant with the security policies of our client
  + Enable support for userbase that spans across 30+ countries
  + Launch Timeframe: 12 months

**Our Approach & Solution:**

* Creospan provided a team of 3 - 1 Delivery Manager and 2 Dev Engineers to solve this challenge for our client
* We adopted the following approach for this client
  + Conduct and technical and business audit of the existing system
  + Understand pain points of end users, technical and business constraints
  + Develop a web application that can be accessed through desktop and mobile platforms
  + Incorporate the principles of scalability and reliability using Cloud & Microservices framework
  + Test & launch this solution in an iterative manner
* Within 7 months of our first meeting with the client, we were able to launch the first version (MVP) of this web application that provides charity transaction management services to end users in 30+ countries
* This web application allows end users and financial planners to manage beneficiaries, configure charity payments on monthly and yearly basis and explore institutions that are aligned with the social cause designated by each user for respective financial accounts

**Business Benefits**

* **Enabled Cross-Platform Compatibility for users in 30+ countries**
  + Users in 30+ countries can now manage their charitable trust and corresponding financial transactions in real-time on both mobile devices and desktop
* **Enhanced Customer Satisfaction**
  + Users in 30+ countries are no longer required to maintain a desktop application
  + IOS users are no longer required to use Virtual Machines to access the legacy applications
* **CAPEX & OPEX Savings**
  + Significant savings on CAPEX & OPEX front as the cloud-based solution used in this case is scalable, reliable and can use on-demand resources provided by cloud service providers at fraction of cost of their desktop counterparts
  + 40% reduction in customer complaints associated with charitable trust financial management services post the launch of this web application

**Technology Stack:**

* React, Java, Microsoft Azure DevOps, Pivotal Cloud Foundry, GitHub Version Control, Bamboo for CI/CD, IBM DB2 Database

**Consultant interviewed for this case study: Edward Tanko (FB)**

**\*\* Note this project is Due December 2022 and was started in June 2022. Numbers listed above are estimated based on the overall conversation with the POC**