Tyler Butler

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IT Analysis

System Vision Document

John and Jacob

**Problem Description**

Competition is intense in the brokerage business and John and Jacob, Inc is no exception. With competitors who have a great deal of resources at hand, it is time for John and Jacob, Inc to gain a competitive edge. With a growing need for more modern communication between brokers and clients, John and Jacob need a renovated trading system which is modernized with many features. This system needs to allow clientele to be able to trade, analyze and gain reports about their investments in a fast and easy-to-use system. The system also needs to allow brokers to be able to view and edit investments and reports. A modernized system is crucial to keeping this company in the forefront of the brokerage business.

It is recommended that this business update their system to allow clients to seamlessly edit and confirm investments while allowing brokers to assist clientele with some of the same functionality but with an administrator’s level of access. Furthermore, the system should be ported over to mobile devices to allow for a more accessible system by clients and employees.

**System Capabilities**

The new system should be capable of:

* Being used by multiple devices including: Tablets, Computers and phones
* Allowing twitter messaging to enhance communications between brokers and clients
* Further supporting email communications with updated interfaces and systems
* Allowing clients to make and view trade order entries, investment analysis reports, trade confirmations, customer statements and reporting
* Allowing broker’s, a system in which they can assist clients in purchasing, editing or viewing investment information and reports

**Business Benefits**

It is anticipated that the deployment of a newly updated trading system will provide the following business benefits:

* Increased communication between brokers and clients
* Facilitate more trades due to a modern trading system
* Increased customer happiness
* Increased productivity within brokers due to an easier and more modern system
* Gain a competitive edge over fellow brokerage firms