

case study: product development

Situation

The resourcing of tools and skillsets can be a matter of life and death to a smaller company. But it can also be an important component of continued growth. A small development division of DST was searching for a new product with which to arm the sales force. Sales to financial institutions were stagnant given the consolidation of the banking industry. Given a large group of great client relationships, new products were a natural.

Given the range of technical capabilities, several stood out. A relatively new technology for the conversion of fax data to electronic documents, a reputation for integral storage of financial information, and the ability to aggregate and safely keep personal files led to an innovation that had yet to find a place in the market.

Innovation

The electronic equivalent of a massive filing cabinet, Crescendo is a web-based product that provides the engine for access to a wealth of financial information. Financial institutions can brand this application to offer customers a convenient clearinghouse and management resource for information about financial products and services, and investment vehicles — along with the ability to store legal documents and other data indefinitely. Above all, Crescendo-powered sites have to be easy to use for both financial institutions and their customers.

A thorough examination of usability and the appropriate level of Crescendo branding elements was conducted within the scope of a web browser. These determinations provided the core direction for development of the Crescendo interface, with key components including electronic document transmission, automatic document recognition and sorting by type, and an entry portal for new users.

In developing an intuitive interface prototype for the product, we achieved a finely tuned balance of front-end functionality and back-end manageability. Along with the addition of the “Powered by Crescendo” logo, the interface’s user-centric design supports the positioning of Crescendo as a high-performance and practical solution for co-branded e-service implementation.

