



Sitecore
Case Study:



eQ Asset Management – In just over eight weeks from project start, eQ was geared up to serve its customers with new online services

Summary

eQAsset Management develops and offers the best asset management services for over 11,000 demanding clients in Finland. Its mutual fund selection is comprised of 23 of its own funds, as well as a broad selection of partners' mutual funds, covering all major investment categories. Acknowledging that the internet is a very important channel for any financial institution, eQ focuses on their guarantee that their customers have access to a constant online service. This means that when changes need to be made on their website, they need to be done fast and coherently.

In the spring of 2010, eQ Asset Management had no choice but to adjust at light speed to the consequences of an internal restructuring. The situation: the company was formerly part of eQ Bank Ltd., which merged with NordNet, leaving eQ Asset Management operating as an independent company without the business support and IT infrastructure previously provided by eQ Bank. This situation required a focused plan to build the enterprise's core IT infrastructure, plus a variety of online services for its clientele. And this had to be done in less than three months. For that audacious goal to be reached, they relied on Sitecore and its partner, atBusiness, to implement the online strategy.

Although it may sound like mission impossible, eQ's digital services were designed and developed in just over 8 weeks. Most impressively, the whole process went smoothly and the results are better than they dreamed.

Challenge

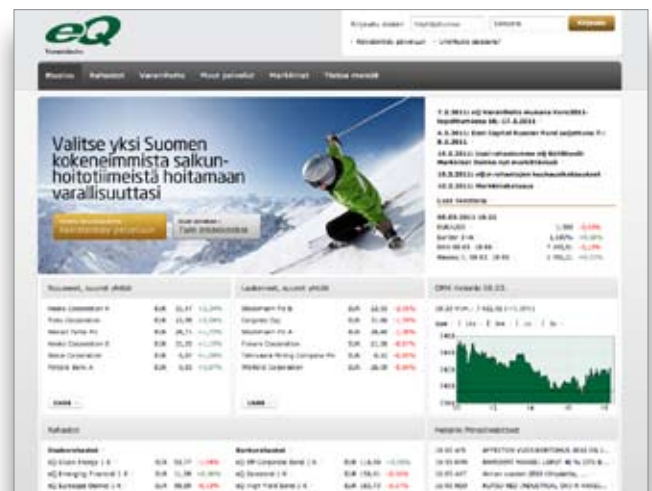
Aware of the fact that customers are hard to please when it comes to the technical side of a financial service, eQ gave all its energy to keeping its website credible while the company was being reorganized.

eQ Asset Management searched for a digital partner that was able to juggle different and tight deadlines, while maintaining a high quality of consulting services. atBusiness was the perfect match, mostly because they have positive know-how in working under pressure with the financial sector. atBusiness

introduced eQ to Sitecore's CMS platform, knowing that it would offer the option for eQ to go the extra mile, if needed. This means that by using the Sitecore CMS they can create a consistent, logical and up-to-date web-site that can easily be extended anytime.

**EQ Asset Management
Web Site**

www.eqvarainhoito.fi



Sitecore Case Study:



“The brand eQ has always stood for a sophisticated self-service online channel and we wanted to continue that tradition. We could not have achieved that without atBusiness and Sitecore.”

**—Sami Helminen,
eQAsset Management
CIO**



“We were positive that the solution could be designed and delivered in just two months. Project teams’ devotion backed by Sitecore’s flexible platform made it possible.”

**—Perttu Monthan, Director,
Sales & Marketing,
atBusiness**

www.sitecore.net

“eQ presented a challenge that we were eager to take. We were positive that the solution could be designed and delivered in just two months; we had been there before. Project teams’ devotion backed by Sitecore’s flexible platform made it possible”, explains Perttu Monthan, Director, Sales & Marketing, atBusiness.

Aside from offering a user-friendly and freshly designed website for both current and potential customers, eQ Asset Management envisioned a website that would encourage customers to subscribe to their funds and inform them of the company’s other discretionary asset management services. It was also hoped that it would attract new customers.

“Having a transactional online system with the best content management capabilities is almost a life and death issue for the Finnish financial market. The brand eQ has always stood for a sophisticated self-service online channel and we wanted to continue that tradition. We could not have achieved that without atBusiness and Sitecore”, says Sami Helminen, eQ CIO.

Solution

The solution chosen by eQ Asset Management includes a public website with self-service functionalities via strong authentication procedures. eQ also supplies backend integrations for things such as market data, portfolio data and reports to allow for maximum control.

“Being a company with almost zero in-house technical skills, we had to choose a web platform where we could easily produce both content and to be able to handle parameters for our online transaction services.

This includes mutual fund subscriptions and portfolio reporting. At the top of our requirements list was: seamless integration to financial market information providers,” sums up CIO Sami Helminen.

Result

eQ believes that due to the redesign and improvement of their online service functionalities, they are now in a far better position in the market than previously. “Now we are able to serve our customers with true flexibility and ease. That is why we have already received a substantial amount of positive feedback from customers,” comments eQ’s CEO, Lauri Lundström.

eQ plans to develop their website to become even more marketing and sales oriented in the near future. Their idea is to use the online channel for most of their customer reporting and communication in their roadmap, which will be beneficial for both customers and eQ’s staff.

Technology Highlights

Solution Special Ingredients:

The technical platform is based on the Sitecore CMS;

Additional functionalities: strong authentication, subscribing to / redeeming mutual funds, all based on Microsoft .Net technology & web services;

Sitecore serves as the publishing platform for backoffice solutions;

Market data from Interactive Data is integrated into the front-end, as well as direct steps to transactions for end-users.



Sitecore redefines how organizations engage with their customers online, powering experiences that can sense and adapt to a customer’s needs to increase revenue and customer lifetime value and satisfaction. Sitecore was the first Web Content Management system (WCM) to incorporate marketing automation, intranet portal, e-commerce, Web optimization, social media and campaign management technologies into a cohesive, integrated open platform. Sitecore’s software makes it easy for businesses to identify, serve, engage and convert new customers online.

Sitecore’s broad choice of capabilities enable marketing professionals, business stakeholders and information technology teams to rapidly implement, measure and manage a successful website and online business strategy. Its powerful development platform, integrated marketing automation tools and intuitive editing workspace enables successful websites of all types.

Thousands of public and private organizations have created and now manage more than 24,000 dynamic websites with Sitecore including ATP World Tour, Computer Associates, ISS, Lloyd’s of London, Microsoft, Omni Hotels, Siemens, Thomas Cook and The Knot.

Sitecore
www.sitecore.net

EQ Asset Management
www.eqvarainhoito.fi

atBusiness
www.atbusiness.com