Coforge combines its wealth management industry knowledge with its testing expertise to deliver a focused solution to our clients. Our testing solutions are designed to help wealth management institutions achieve success with their programs. We help clients scale from individual projects to Testing Centers of Excellence in different phases of the lifecycle—Agile or Hybrid. Our matured business testing processes combine best practices, deep domain expertise, and test accelerators to test all types of financial platforms in a robust and proven way.
Our Solution

Changing industry dynamics, competitive pressures, regulatory compliances, demanding customers, and business partners are increasingly straining IT budgets. This, while business continues to expect the highest level of quality for their systems. Add the Internet of Things (IoT) to the mix—IoT is shaping how organizations interact with their customers, partners, and employees—and you have the perfect impetus for wealth management institutions to become more agile and flexible for uninterrupted growth while ensuring compliance. The success of agile environments necessitates foolproof testing within shorter timeframes. To succeed in such environments, wealth management institutions need end-to-end testing solutions to mitigate business risks and costs.

Coforge has proven experience of over 16 years in servicing wealth management institutions. Our dedicated wealth management practice has over 5,000 person years of solutions delivery experience.

### Wealth Management Business Drivers

<table>
<thead>
<tr>
<th>Customer Centricity</th>
<th>Advisor Experience</th>
<th>Regulations and Compliances</th>
<th>Channel Integration</th>
<th>Data Visibility</th>
<th>Cost Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer onboarding</td>
<td>CRM</td>
<td>KYC/AML</td>
<td>Mobile/tablet</td>
<td>EDW</td>
<td>STP</td>
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<tr>
<td>Multi-channel</td>
<td>Multi-channel</td>
<td>FATCA</td>
<td>Cloud</td>
<td>RDM</td>
<td>Legacy modernization</td>
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<tr>
<td>Analytics</td>
<td>Advisor workstation</td>
<td>RDR</td>
<td>Browsers</td>
<td>Reporting</td>
<td>Rationalization</td>
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<td>Reporting</td>
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<td>EMIR</td>
<td>Internet banking</td>
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<tr>
<td>Relationship management</td>
<td></td>
<td>Post-trade compliance</td>
<td>Social engineering</td>
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<tr>
<td></td>
<td></td>
<td>Advisor compliance</td>
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</tbody>
</table>

Minimizing business risks and costs with near-zero critical defects in production

### Testing Imperatives

<table>
<thead>
<tr>
<th>Agile</th>
<th>Domain-led functional</th>
<th>Regression</th>
<th>UI</th>
<th>Data security</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automation</td>
<td>Multi-channel</td>
<td>System</td>
<td>Compability</td>
<td>Data analytics</td>
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<tr>
<td>Domain-led functional</td>
<td>Digital</td>
<td>Risk management</td>
<td>Security and privacy testing</td>
<td>Test data masking</td>
</tr>
<tr>
<td>Integration</td>
<td>Performance</td>
<td>Performance</td>
<td>Privacy</td>
<td>Privacy</td>
</tr>
<tr>
<td>Digital</td>
<td>Agile</td>
<td>Agile</td>
<td>Digital content and access control testing</td>
<td>Data security vulnerability and intrusion detection</td>
</tr>
<tr>
<td>Multi-channel</td>
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</tbody>
</table>

Standardization and consolidation of QA services
Enterprise automation strategy
Our integrated test accelerators portfolio comprises an effort optimizing tool, ROI analyzer, process maturity facilitators, Web and mobile automation scorecards and frameworks, an orthogonal arrays-based test coverage maximizing tool, risk-based testing, analytics-driven monitoring and continuous improvement framework, and cloud-enabled mobile testing lab. This helps us to offer enhanced test coverage and reduce overall testing cycle time—resulting in reduced total cost of ownership and time-to-market. Below are some examples:

- **ASE²T (Automation Simplified End-to-End Testing)** Accelerator is user-friendly, excel data sheet, and VB scripting-based framework for optimum automation and quick ROI. It provides 16%-20% faster ROI than other frameworks.
- Risk-based testing utility helps in driving priority-based testing through score card-based risk analysis. It provides 10% reduction in production defect leakages.
- Multi-channel experience (advisors and customers) validation based on our proprietary wealth management digital maturity assessment toolkit.

**Our Domain-centric Testing COE Delivers Business Results**

We drive quality and productivity by offering comprehensive testing strategy and execution—both functional and non-functional—for all wealth management business processes, multi-channel transformation, and automation programs. For agile-driven projects, we define the testing focus early using risk-based analysis and implementation of governance principles of business outcomes including cost, quality, and time-to-market.
Case Study: Wealth Management Platform Testing

- 45+ software products supported
- 350+ releases per year
- ~50 products tested
- ~200 functional modules tested
- Created and executed test suite (16000+ test cases)
- SP-self tester to facilitate self-execution of end-to-end testing
- Used wrapper—MATT (Mainframe Automated Testing Tool)—for testing in mainframe
- App scan for Web security testing
- Reduced testing cycle time by 20% to 30%
- Reduced TCO and Optimized costs by 20% to 25%

Delivering Value

- More Savings: Up to 50 % reduction in test execution costs
- More Agility: 20% to 30% reduction of test cycle time
- More Satisfaction: 10% to 15% increase in software change requests handled/month
- More Stability: 35% to 50% increase in testing environment’s stability
- More Accuracy: No critical defects in production
- More Flexibility: Ability to scale up or scale down through a range of flexible and predictable engagement and pricing models
- More Automation: 60% to 70% automation of business critical test cases and regression test cases with ROI in 5 to 7 cycles

The Coforge Advantage

Coforge has gained extensive competence and deep domain expertise in the financial services business given our longstanding partnerships with leading financial institutions. Our technology expertise and business understanding ensure efficient, scalable, secure, and robust solutions that are tailored to the needs of our clients.

- Deep financial services domain expertise with best practices formulated over the years that enhances customer experience, increases productivity, and efficiency—leading to high revenue for the financial institutions
- One of a handful of global companies to have achieved SEI CMM Level 5 assessment. We are ISO 27001, ISO 9001, SAS70 (Type II) examined, and COPC certified v4.0 company—signifying that our processes meet world-class quality standards
- World-class IT infrastructure to meet the stringent requirements of mission critical processes
- Proprietary online tools and platforms to drive business intelligence, consistency, and standardization for a multi-lingual and multi-location environment

For more information, contact information@coforgetech.com
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Coforge is a leading global IT solutions and services organization which believes that real transformation cannot be driven by thinking in technology terms alone. With a mission to “Transform at the Intersect” it aims to bring both deep domain and deep emerging technologies expertise to achieve real-world business impact. A focus on very select industries, a detailed understanding of the underlying processes of those industries and partnerships with leading platforms provides us a distinct vantage. We leverage AI, Cloud and Insight driven technologies, allied with our industry expertise, to transform client businesses into intelligent, high growth enterprises.

Learn more about Coforge at: www.coforgetech.com

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