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## Tax Auto-optimization System

### ***Client Overview***

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The client is the world's leading provider of financial services to institutional investors. Its broad and integrated range of services spans the entire investment spectrum, including research, investment management, trading services and investment servicing. In all of the markets that the client serves, it ranks among the top world wide service providers. The system that we maintain could help make better investment decisions and control costs more effectively.

### ***Business Drivers***

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The tax auto-optimization system architecture is relatively mature after years of development. Although system users still raise new requirements, keeping a whole development team in the US is not cost efficient. To optimize resource utilization, the client decided to transfer maintenance and production support work to China and only kept a small group for communication and deployment work.

The key objectives of the China project are:

- To implement users' enhancement requirement
- To monitor system health and find exception
- To fix all the issues in old system
- To be on call for any emergency system issue from front-desk
- To improve system scalability and performance

### ***Project Challenges***

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- Most parts of the system were transferred to us without complete document
- Business logic and implementation of tax calculation are very complex

### ***Solution/Methodology***

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- **Team structure:**

The whole team consists of three parts:

- US Development Team (four developers):
  - Requirement communication and prioritization
  - Maintenance management
  - System deployment
  - Small enhancements
  - Small Use Issue Response
- China Production Support Team (two PS)
  - System health monitor
  - On call
- China Development Team (seven developers)
  - System Analysis and Documentation
  - Function Enhancement
  - Performance Tuning
  - Bug Fix

- Major User Issue Response

**Technology covered:**

- Front end: J2EE, EJB, JSP, Hibernate, Flex, Ajax
- Back end: UNIX, IBM MQ
- Database: Oracle 10g

- **Management Model:**

- PS monitor system health daily and report issues to US DEV Managers
- US DEV communicate and collect new enhancement requirements
- All issues and optimization suggestion are reported to US DEV managers
- US Dev manager prioritize all development tasks and design release plan to China developers
- China developers develop and release to US developers for deployment
- China developers are also responsible for documenting all modifications and enhancements

***Benefits***

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- China team take over around 70% of the maintenance and support work and all deliverables have been timely and with high quality
- Cut maintenance cost about 60%
- Respond to users' emergency requirements much faster by consecutive development
- Fix more than 30 bugs of the legacy system
- Make tax auto-optimization system easier to be integrated into other systems
- After the performance tuning, I/W system can support 300 more clients

***The Voice of the Customer***

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"The performance of the system improved a lot after your team's effort; it is really more convenient for me to make my own decision now"

----- By USA Business Customer

"I do find some improvement of the system's interface, it's easier for me to find the information that I want nowadays. And when I want to make an investment decision, I just wait for the system's calculation; I trust the result and would like to rely on it!"

----- By support user