

## Hengtian Helped a Leading Investment Consulting Company Rebuild Its CRM System

### Overview of the Client

The client is a registered investment advisor that helps hundreds of world's leading institutional investment managers increase portfolio performance by providing global buy and sell recommendations, customized independent research, and market advice.

### Services Provided

By collaborating with other onsite and offsite technology teams globally, Hengtian helped the client build a CRM system on both desktop and iPad through various software technologies expertise such as business analysis, software development, quality assurance, product support and consulting. The project lasted for 9 months, in which over 10 Hengtian engineers took part.

### Business Value Added

This new CRM system, with high flexibility to respond to changing business conditions, provides the sales executives with better strategic control, insight into sales campaigns and current client activities, and the ability to determine where to penetrate the market.

And it provides the Account Managers with access to information at their fingertips that will aid them in opening lines of communication with prospects and clients as well as arming them with critical information priority to contact with these prospects and clients.

Besides, it provides the institutional sales staff with a consolidated view of institutional contact data, news, profiles and portfolio holdings.

## Highlights of the Hengtian Solution

1. Automation: Code Smith tools were used to generate all business models for Data Access Layer.
2. Usability: AngularJS was used to get better maintainability and less code (no more DOM bind).
3. High-performance: All requests were based on AJAX. The data was compressed with gzip so as to reduce network transfer and make use of UI-grid and paging to implement to load data via requiement, but loaded all data at a time.
4. Design List Manager Service, Detail Manager Service to cache business data in client as a singleton pattern.
5. The Data Access Layer was refined to Enterprise Library, unify API operation and avoid sql injection attack with sql parameter.
6. The business service mechanism was based on Windows Communication Foundation,which provided compatibility with different systems.



Figure 1: UI Reference Architecture

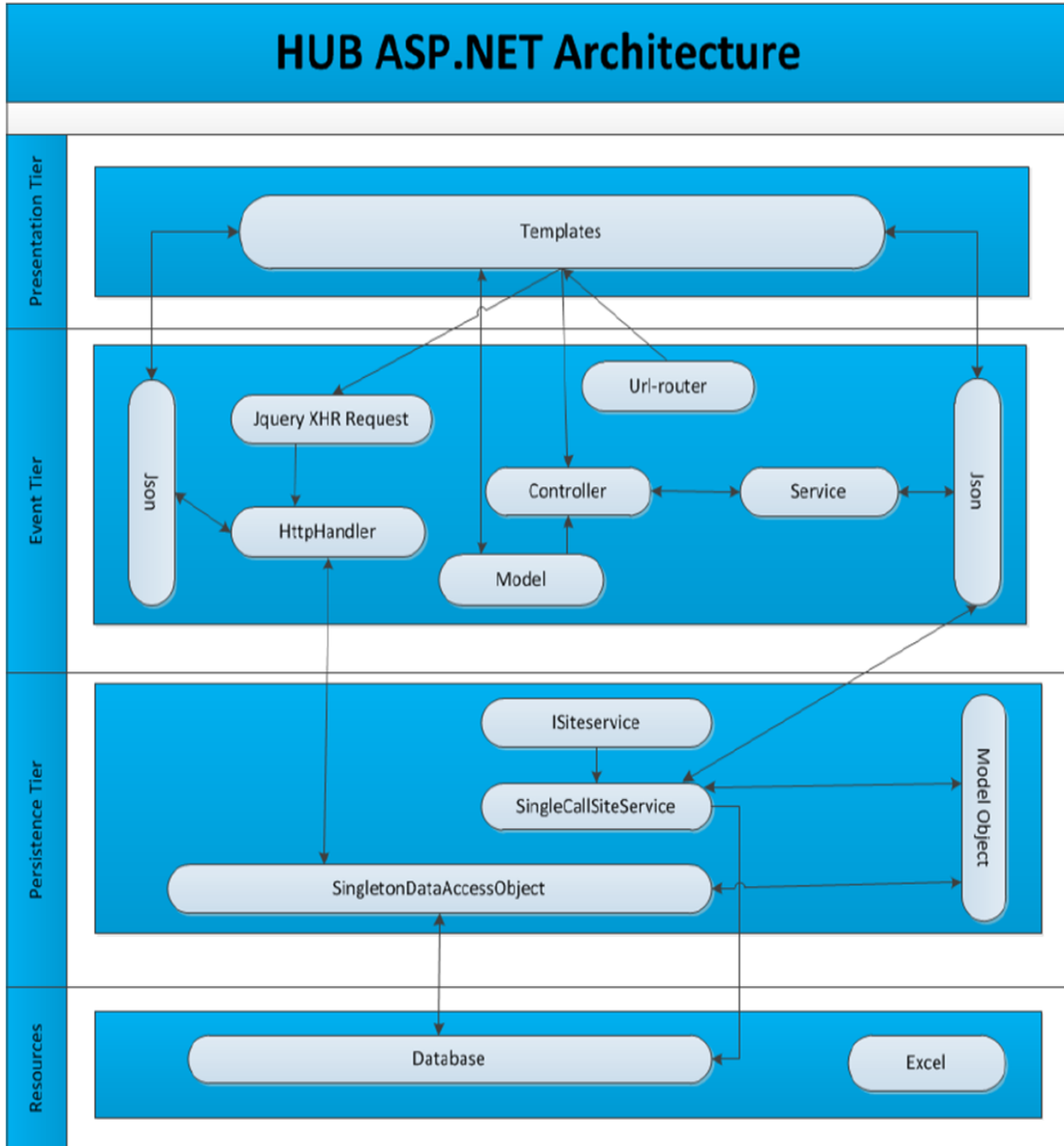


Figure 2: Hub ASP. NET Architecture

## Voice of the Client

“Thank you for all the hard work. This has been a long journey to make it to where we are right now. The new system was presented to the Account Managers, Client Services, and Analyst teams last week and they’ re very excited to start training and using it. We’ re holding them back until the product is ready. This is tough because there are many new features they are anxious to utilize. It’ s easy to see the value that you’ ve designed and are building, and they want these tools so they can be even more successful. This is great news and you should be proud of their excitement. They are excited because of your relentless desire to complete this product.”

—Client’ s Assistant Vice President