



Digital Portal Consolidation

OVERVIEW



CHALLENGE

A large bank client had built multiple portals, mobile applications, and APIs for customer interactions over a period of years. Each channel was developed for specific client segments with different functional needs. Alignment and consolidation of customer channels became a pressing issue.



SOLUTION

Treliant worked with a range of client stakeholders to deliver a path to rationalize a dozen portals into two within two years, then ultimately to a single portal for a streamlined customer journey.



APPROACH

Our team provided governance advice and program management support across this multi-workstream, multi-year support, which impacts dozens of client systems. We delivered business analysis to define integrated user journeys and identify jurisdiction-specific handling, then performed the data analysis to align user identities and access rights. Our staff also led key technical workstreams.

RESULTS

- ✓ The program is achieving material results in year two of a five-year strategy.
- ✓ Ultimately, the client's customers will use a single, integrated user journey for multi-part transactions (e.g. FX payment on the back of a loan).
- ✓ Core functionality is aligning to two portals in 2023 and will subsequently consolidate on a single gateway for streamlined user journeys.
- ✓ This consolidation simplifies access control and identity verification, thus optimizing the internal processes required to onboard and support the client's customers.