



Case Study: Gap Analysis and Strategic Roadmaps

Challenge

One of the country's largest brokerages was facing the threat of declining market share and profitability from their Active Trading Business Units.

Solution

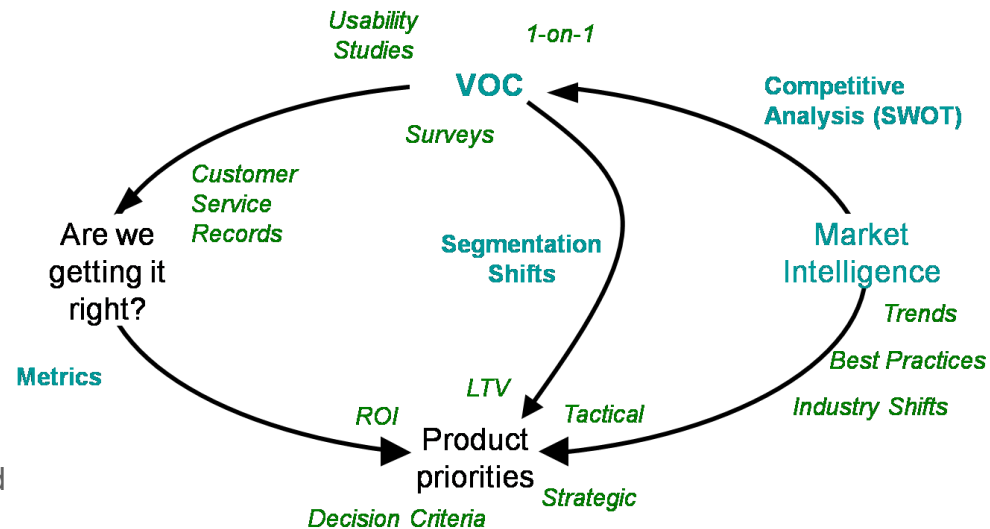
A Gap Analysis identified four areas which had to be addressed :

Customer Segmentation was realigned. Based on usage patterns, the four new segments could then provide a base for tracking tools preferences, usage and ROIs. Trading platforms were restructured and aligned with the new segments. The total number of platforms was reduced by half.

Channels for qualitative "Voice of the Customer" (VOC) were added to provide valuable insights into emerging trends and requirements.

Business Intelligence was extended beyond "the big 4" to catch market shifts and innovations.

Metrics were configured to capture information on tools usage. This provided immediate feedback on most popular features allowing the platforms to be optimized with less popular configurations phased out.



Results:

The # of trading platforms and associated support costs were reduced by half.

The remaining platforms were aligned with trading tools' usage patterns. Most customers perceived these changes, along with the new VOC channel, as a positive indication that the company was being responsive to their needs.

The usage data and new BI focus alerted the Company to important shifts, such as the rise of currency futures trading, in time to address new requirements within their platforms. The company no longer lagged other brokerages in offering key features.