

QualityKiosk Powers Digital Transformation for a US based Wealth Management Technology Firm



Client Overview

The New York based client is a global technology leader with solutions that power investing, governance, and communications for clients and the financial industry. Trusted by banks, broker-dealers, asset managers, and corporate issuers worldwide, the firm plays a critical role in the daily operations of global financial institutions, from securities processing to investor communications.

It supports billions of communications and transactions annually, delivering compliant, time-critical statements that keep global financial markets moving.

Engagement Overview

As part of a strategic digital transformation program, the company set out to build a new platform that ingests client data at scale, transforms it into compliant wealth statements, and distributes them across multiple channels in real time.

QualityKiosk was engaged as the development partner to build the application end-to-end. The engagement was structured around dedicated software development PODs operating with defined SLOs.

Business Challenges

The organization faced engineering and operational challenges that needed immediate resolution:

Scalable Client Onboarding

The existing systems could not keep up with onboarding a significant volume of new clients across different geographies without impacting delivery timelines or platform performance.

Complex Data Ingestion and Transformation

The client needed a secure, automated platform to ingest large datasets from multiple sources, transform them in real time, and render personalized wealth statements ready for distribution.

Real-Time Statement Generation

Generating compliant, branded PDF statements at high volume required a tightly integrated front-end and back-end architecture. Performance SLOs left no room for slow rendering or manual handoffs.

Stringent Security and Compliance Requirements

Given the nature of financial services, every component of the platform had to comply with global regulations, ensure data confidentiality, and withstand rigorous security audits.



Our Approach

QualityKiosk deployed dedicated software development PODs of 6-8 members each, including a Scrum Master, Product Owner, Developers, SDETs, and Automation Engineers. Every POD operated as a self-contained development unit with end-to-end ownership of features, ensuring quick alignment with business objectives and direct accountability for delivery outcomes.

The PODs worked closely with the client's product owners and compliance teams to define business goals, design the technical architecture, and align with regulatory constraints. The teams then provisioned a cloud-native, AWS-based environment with encryption, role-based access controls, and hardened security to safeguard sensitive financial data.

Using Mainframe, AWS, PostgreSQL, MuleSoft, Kafka, Java, Python, OpenText Exstream, and Selenium, the team designed and built the following components:

- **Cloud-Based Data Ingestion Pipeline:**
Engineered a secure ingestion layer where client data files are uploaded to AWS and processed into PostgreSQL in JSON format, supporting high-volume, traceable processing across geographies.
- **Dynamic Data Transformation Engine:**
Built a MuleSoft-based transformation layer that converts ingested JSON into client-specific formats using rule-based logic, allowing new statement types to be onboarded without re-engineering the pipeline.
- **Real-Time PDF Generation and UI Integration:**
Developed templated workflows in OpenText Exstream that render compliant, branded wealth statements in real time, with a front-end interface that surfaces them directly to clients.
- **Multi-Channel Distribution Layer:**
Implemented an automated module that delivers statements through email, print, and microsites, supporting personalized engagement across every channel the client uses.
- **End-to-End Application Automation:**
Orchestrated ingestion, transformation, generation, and distribution into a single automated workflow that runs at enterprise scale.



Business Impact

The new platform reshaped how the company onboards clients and delivers personalized communications:

- **Accelerated Client Onboarding:**
The platform absorbed significantly higher onboarding volumes without proportional increases in workforce, giving the company headroom to scale its US client base.
- **Faster Time-to-Delivery:**
Automated ingestion, transformation, and real-time PDF generation collapsed turnaround time across the statement lifecycle, helping new services reach end customers faster..
- **Enhanced Operational Efficiency:**
A single orchestrated pipeline replaced manual workflows, improving data integrity and freeing internal teams for higher-value work.
- **Improved Customer Experience:**
Multi-channel distribution ensured every end client received personalized, compliant statements through their preferred channel.
- **Foundation for Digital Transformation:**
The cloud-native, modular architecture positioned the platform to support new statement types, additional client geographies, and future growth without re-engineering the core.

The engagement demonstrated that with complete development ownership and the right technical depth, even highly regulated, high-volume financial platforms can be built and scaled at pace.



About QualityKiosk Technologies

QualityKiosk is a focused Reliability, Cloud, AI, and Product Engineering solutions provider. The company, established in 2000, offers diverse services enabling organizations to adopt and adapt AI in Product Development, Quality and Reliability Engineering, CloudOps and Automation. In an AI-first world, QK synthesizes deep domain expertise with excellence in technology to consistently deliver great experiences for its customers' customers.

Operating in more than 25 countries and with over 3,500 employees, QualityKiosk helps leading brands in banking, capital markets, insurance, automotive & manufacturing, technology & digital natives, consumer goods, and healthcare to transform their digital capabilities.

The company's expertise and achievements have garnered recognition from esteemed global advisory firms such as Forrester, Gartner, and The Everest Group for innovative, IP-led solutions and the significant value those solutions deliver to clients.

For more information, visit:
www.qualitykiosk.com.

