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USE CASE

Modernizing Fund Management Applications for Performance and User Experience

Through an **11-month engagement with 7 developers working closely with the client team**, Noesis successfully modernized a critical investment management platform, **delivering major performance and experience gains** while preserving and enhancing core functionalities.

This transformation has positioned the client to operate more efficiently, meet regulatory demands, and improve collaboration across advisers and fund managers.

| **Sector** | **Delivery Unit** | **Solution** |
| Legal | Low Code Solutions | OutSystems |

THE CHALLENGE

The existing tools lacked the performance, flexibility, and user experience necessary to handle growing demands, making it difficult to:

› Efficiently manage and track the delivery of draft and final questionnaires;

› Reuse past questionnaire answers to reduce manual effort and speed up completion;

› Eliminate time-consuming administrative work related to distributing and collecting questionnaires;

› Ensure consistent, professional formatting across all documents produced.

The need to **migrate to a modern**, **scalable platform** while preserving key functionalities and dramatically improving usability was critical.

GOALS

A legal client was interested in building an investment advisory ecosystem for **advisers**, **fund managers**, **and board members** that required modernization of its core applications to improve transparency and efficiency in managing **15(c) questionnaires**.

SOLUTION

Noesis led the **migration of both Adviser and Fund Management** applications to **OutSystems ReActive**, focusing on preserving core functionalities while enhancing performance and user experience.

Adviser portal

> Allows advisers to **monitor and manage the full lifecycle** of 15(c) questionnaires;

> Tracks delivery schedules of drafts and final versions to ensure timeliness and compliance.

Fund Management portal

> Enables **reuse of previous questionnaire responses**, reducing manual data entry and speeding up delivery;

> Eliminates administrative tasks tied to questionnaire distribution;

> Ensures **standardized document formats**, improving consistency and professionalism;

Key Improvements

> Full migration to **OutSystems ReActive**, ensuring a modern, scalable architecture;

> **Significant performance enhancements** ~60% improvement;

> Completely **redesigned user interface,** driven by a **UX/UI assessment** to improve customer experience.

Technical Foundation

Migration executed on **OutSystems ReActive**, leveraging **modern front-end frameworks and optimized back-end architecture** to deliver a responsive, high-performance user experience.

RESULTS

> **60% performance improvement**, leading to faster response times and smoother user interactions;

> **Significantly improved customer experience**, through a redesigned interface and enhanced usability;

> **Standardization and automation** of questionnaire management, reducing manual effort;

> Currently in use by **4 client organizations with 20+ advisers**, supporting real-time collaboration and process transparency.

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Noesis is an international technology consulting company with almost 30 years of experience offering solutions to support companies' business and digital transformation. Noesis has an extensive portfolio of IT services, working in various areas including IT Ops & Infrastructure, Cloud & Security, Enterprise Solutions, Low-Code Solutions, Data Analytics & AI, DevOps & Automation, Quality Management, Enterprise Application Integration and Professional Services.

The company has +1200 highly specialized talents and is operating in seven countries: Portugal, Spain, the Netherlands, Ireland, Brazil, the USA and the UAE. Noesis is part of the Altia Group, listed on the Spanish stock exchange BME Growth, with more than 3500 professionals working in eight countries and more than 20 locations.