

Power of Attorney Automation



About Company

A distinguished multi-award-winning financial services company, operates at the intersection of tradition and innovation. As a Closed Joint Stock Company regulated by Saudi Arabia's Capital Market Authority, our client is offering a comprehensive suite of Shariah-compliant financial products and services. From asset management to brokerage, unwavering commitment ensures excellence for discerning clientele. Rooted in Riyadh yet globally oriented, our client has a legacy etched in trust, resilience, and enduring partnerships.

Business Challenges

- Capture unstructured content from retail branch counters
- Automate business processes for workflow approvals
- Provide work basket or inbox for every stakeholders
- Protect mission critical PoA applications and related data.
- Upgrade outdated technologies to ensure stability and support.
- Implement features for audit review and SMS notifications.
- Ensure performance and stability for users facing issues.



Solution



- Migrate away from SharePoint and embrace a more agile, low-code platform "JOGET" that leverages Micro Services and DevOps for scalability and security.
- The upgraded application now includes a new feature for Audit Review and integrates an SMS Gateway via APIs.
- The data from the old platform was seamlessly migrated using JOGET's export/import capabilities.
- Future-proofing the system, client plans to integrate with the Broker system using APIs.

Benefits



- Reduce operational costs by 70% through faster application development and minimal maintenance.
- Ensure seamless compliance with automated reporting workflows.
- Accelerate client onboarding with automated PoC and document capture.
- Improve decision-making by integrating data across departments.

"The modernization of the Power of Attorney application has significantly improved our processes. The transition to JOGET and the introduction of new features have enhanced efficiency and user experience.

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