

SEVEN 
Investment Management

Case Study



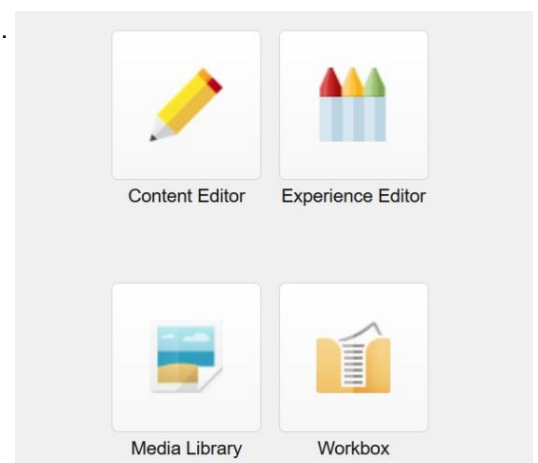
Award winning 7IM website geared to achieving digital goals

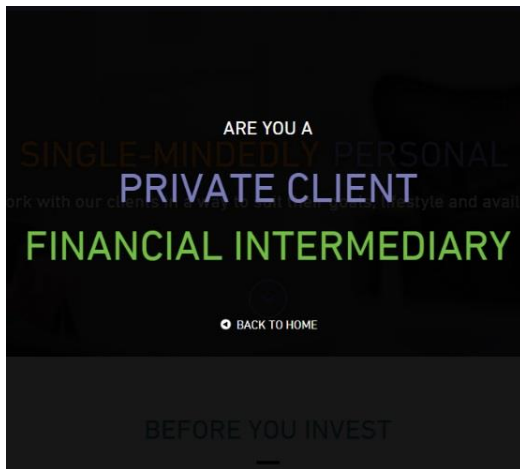
Aligning with other financial institutions is essential to keeping up with competition. Seven Investment Management (7IM) has modernised its website on the Sitecore platform. The website's aim is to improve the user experience, drive conversions and attract new business.

EASIER FOR CONTENT EDITORS

The use of modules rather than rigid page types enables content editors to easily build, test and personalise pages. Our team developed a wide array of modules from simple “Hero” and “Call-to-Action” modules to the more advanced Fund related modules, which have complex underlying business logic.

To facilitate the uploading of time sensitive and regularly updated fund share class data, we developed a custom import tool. This tool is located in an extended navigation ribbon. Custom extensions such as this demonstrate the true extensibility of Sitecore.





GETTING TO KNOW VISITORS

A validation gateway identifies visitors and serves relevant content to Private Investors and Financial Intermediaries.

Similar to content profiling, this feature, managed in Sitecore by assigning visitor types to pages, gives 7IM's content authors more scope to profile pages.

LIFE AFTER LAUNCH

Since launch, 7IM has enjoyed a significant increase in web traffic and enquiries.

Our Digital Strategists have also formulated a digital roadmap aimed at achieving digital goals through Sitecore's impressive marketing tools. The website has also won two FT Adviser awards.



What was achieved:

- ✓ Winner of two FT Adviser Online Innovation and Service Awards
- ✓ Significant increase in web traffic and enquiries
- ✓ Integration with essential industry systems
- ✓ Formulation of road map to achieve digital goals

ABOUT SEVEN INVESTMENT MANAGEMENT

Seven Investment Management (7IM) was created more than 14 years ago by only 7 people. Since then the company has expanded to more than 200 employees looking after an £11bn portfolio.

ABOUT CODEHOUSE

We design and build effective websites that make global businesses more successful. Understanding our customers' helps create exceptional customer experiences and grow revenues.

As one of the few Sitecore Platinum Partners, and with both Technology and Digital Strategist Sitecore MVPs, we pride ourselves on our unparalleled technical and digital marketing expertise. Our services include creative design and build, consultancy and training, with 24/7 customer support.