



Azad

A door to Financial Freedom, delivered on time!

Serengeti Ventures Pvt. Ltd.

Web Application for Wealth Management

[Azad](#)

Executive Summary

The AZAD web app helps users achieve financial freedom through sound management of their financial plans. The app acts as a bridge between users and certified AZAD Coach Financial Experts (ACE).

Challenges

- The Business Owner's core need was to use technology to effectively help his end-Clients plan their financial future
- The Company required a Web Application with:
 - A customer-friendly look with easy navigation
 - Data Analysis and presentation as graphs
 - Financial Plans and Reports easy for users to manipulate

Attracting

5000+

New users every year!

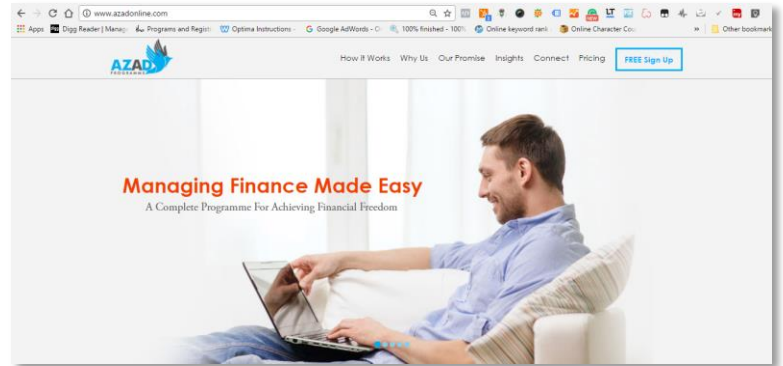
- Interactive features for rich Expert – Client interactions.
- Fast response
- The Company also needed rapid development to support its go-to-market strategy

Process Followed

- Extensive visits and interaction with staff and business owners
- Balsamiq mockups of the solution
- Poker Planning
- Agile methodology with daily standups, sprints and retrospectives
- Test Driven Development
- Code and Progress of work shared with Client on Git and Trac
- Daily 15 min interaction with Client during stand-up, to ensure maximum communication and quick reactions

Features of the application

- Full analysis of a Client's current financial status – including income, savings, loans and assets.
- Draw up a comprehensive plan for Client to achieve financial freedom over a chosen target period.
- Track progress on goals, notifications and reminders to Clients and course corrections to meet goals.



Result

- Through timely application development, Serengeti-Ventures achieved rapid go-to-market for AZAD.
- AZAD is attracting over 5000 New users every year.
- Interactive features are ensuring continuous Client engagement with AZAD.
- Clients can observe benefits by comparing results with previous years.

Technologies used

Ruby on Rails, EmberJS, Ember Data, jQuery, Twitter Bootstrap.

Developed for Web.

PostgreSQL

AWS, Jenkins for CI, Rspec, Cucumber for Integration Testing and Capistrano for Deployment.

Balsamiq Mockups, RubyMine IDE, Git Repository, Trac for Ticketing.