

INTRODUCTION

A leading investment management firm dedicated to evidence-based investing in public and private healthcare and life science companies, looks to Janeiro Digital to transform its portfolio management system.

At the firm's core is its scientifically-trained research team that maps out competitive landscapes in a continual effort to put data into context, identify breakthroughs, and originate conviction in new ideas around pharmaceuticals, medical devices, and diagnostics. The investment manager's research team provides its investment team and portfolio companies with strategic intelligence, market research, and other resources.

In a marketplace as dynamic as healthcare and life sciences, speed matters. The firm relies on its mission-critical, proprietary portfolio management application to make second-to-second investment decisions in one centralized location. Continuous innovation of this application is critical to enable their investment team to anticipate and act on market opportunities, but because of how it was originally architected, it was becoming too costly and cumbersome to achieve the innovation they needed.

To mitigate development risk, the investment management firm turned to Janeiro Digital to re-architect its portfolio management application through Janeiro's **XFORM** platform.

CHALLENGE

The firm's portfolio was originally architected as a monolithic record management system (RMS) application. Much of the business logic resided in the front-end, which made it more difficult to introduce changes. Business logic execution, data processing, and database calls were negatively impacting performance and made the application susceptible to bugs when making changes.

The IT team felt an increasing amount of strain to maintain its legacy portfolio management application at a time when its investment team was demanding a more tailored, robust, and real-time experience to create new opportunities for its fund. The investment team requires insights and capabilities to be accessed quickly and easily, whenever and wherever they need them, while receiving real-time updates and information on valuation and business viability through multiple channels, including clinical trial design case studies, partnership structures, public market dynamics, and many other factors.

In addition, as a result of various one-off development projects that didn't consider future dependencies or integrations, they incurred technical debt that hampered future innovation through new features. The data and logic necessary for these new features was broken up across its legacy platform, making it very difficult to access the full spectrum of information or the full range of capabilities needed to invent something new and valuable.

SOLUTION

Employing their Rapid Alignment, Design and Development (RADD) methodology, Janeiro Digital investigated how to re-platform the firm's vital RMS legacy system. The initial Rapid Alignment (RA) phase was completed in just six weeks. During this phase, Janeiro Digital examined the firm's current infrastructure and data assets to identify the changes that needed to be made, while considering the long-term initiatives that would follow in the months and years ahead.

Through the RA process, Janeiro Digital also defined the right technical architecture, based on XFORM, to meet the needs of the business. Working in tandem, the technical architect and UX designer sought to create an architecture plan that put the user first. The team conducted user experience interviews, created user journeys, audited obsolete features, and designed an improved user experience workflow.

Powered by a flexible microservices architecture, **XFORM** will accelerate development of the foundational components for their solution to be brought up quickly and efficiently. Using XFORM, they are now able to innovate with a shortened foundational building period, and rapidly connect to their legacy system.

BENEFITS

Through its proven RADD methodology and implementation of XFORM, Janeiro Digital is helping the firm digitally elevate its business by monitoring market activity in real time and allowing fund managers to incorporate research findings instantly into the trading decisions they make each day.



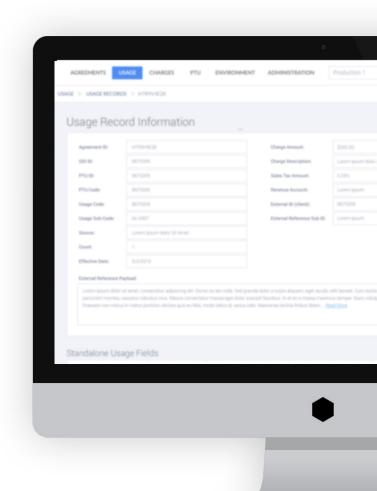
"Investment management is a great example of an industry where there is a direct link between information delivery and ROI, both for the firm and its clients," said Jonathan Bingham, CEO, Janeiro Digital. "By making the decision to move away from its legacy infrastructure, the firm is creating new opportunities for its fund without incurring additional technical debt that will hamper future invention."

Once the portfolio management application is built on XFORM, the firm expects to save thousands of dollars per year as a result of the efficiencies gained in maintaining and building new capabilities.

A TRUSTED INNOVATION PARTNER

Janeiro Digital has been the firm's trusted partner for more than two years and is benefitting directly from Janeiro Digital's investment in XFORM. As a result, the Janeiro Digital team is a go-to resource for validating innovation ideas—a unique way of working together that many larger digital partners do not offer.

The Janeiro Digital team is happy to continue its work with the firm to set its foundation that will power its digital transformation for years to come.



ABOUT THE INVESTMENT MANAGEMENT FIRM

The investment management firm is a crossover investment manager dedicated to evidence-based investing in public and private healthcare and life science companies that are developing drugs, medical devices, and diagnostics. The flexibility of its strategy allows them to lead private, IPO, and follow-on financings for its portfolio companies, both facilitating the crossover process and allowing management teams to drive value creation with fewer capital concerns from inception through commercialization.

ABOUT **JANEIRO DIGITAL**

Janeiro Digital is a digital business consulting services company committed to leveraging digital expertise to benefit their clients. Utilizing technology to enable and address key digital business objectives, Janeiro Digital doesn't just fix problems—they provide sustainable solutions that optimize their client's performance to better serve their customers.



Learn more at www.janeirodigital.com.

