LeapPoint

Transforming Technology for Financial Services

You operate in a highly regulated world with timelines, checklists and hurdles other industries never have to think about. We get it. Technology cannot slow you down, mess you up or get you out of compliance. It needs to make your business faster and better; more profitable and efficient.

At LeapPoint, we work with the country's largest investment firms, wealth advisors, banks and insurance companies to re-architect their existing technology systems in a way that transforms the lifecycle of their business across people, processes and products.

We call it Connected Work™ and it includes six interconnected technology and innovation services: Strategy and Roadmapping, Business Process, Software Implementation, Integration & Development, People & Change, and Reporting & Business Intelligence

LeapPoint's consultants are experts in each of the six areas of Connected Work and can create a custom Connected Work roadmap to help you quickly focus on critical areas for immediate impact and continue to mature from there. We work across a large number of technology stacks and are an Adobe Gold certified partner.

Strategy and Roadmapping

Our Financial Services consultants are in-industry experts who bring the knowledge gained from hundreds of thousands of hours working with clients across the financial services spectrum to you overnight. They know all of the pitfalls and best practices, and will help you overcome the biggest challenges impacting financial services today.

Business Process

LeapPoint and its technology partners provide expert business process knowledge and guidance to ensure financial services companies maintain regulatory compliance, uphold their fiduciary responsibilities, meet customer and shareholder needs, and better respond to the unexpected with agility and resilience. Our solutions are architected and implemented efficiently and effectively to satisfy local, state and federal regulatory body requirements and improve overall productivity and business results.

Software Implementation

It is critical that your systems are strategically implemented and that data is protected at all costs. LeapPoint approaches the design and access to sensitive or privileged information across systems as part of our overall implementation methodology - including the definition of access levels and controls for multiple aspects of a system. We monitor the reinforcement of controls via reporting and surveillance, and in an advanced maturity state, by utilizing AI to review access data and identify any potential breach concerns through automated notifications.

Integration and Development

In order to grow your business, you need technology that is rationalized and well connected, and used in an optimized way across online, mobile and physical locations. LeapPoint architects its clients' systems with digital transformation in mind to remove inefficiencies, disconnects and redundancies to more rapidly extract and put data into a usable format that can easily be leveraged to produce true business insights for quick and smart decision making.

People and Change

LeapPoint helps financial services companies assess what they already have to make sure the right systems are in place and working well together. We listen to the needs of your employees to improve their job satisfaction, productivity and performance through technology that works for them and drives your business forward.
Most companies will need to mature their systems, processes, and roles to prepare for AI and the Future of Work. With significant investments made on systems and processes, our people and change services help you respond to your weak spots to maximize your investments and take confident steps toward the Future of Work.

Reporting and Business Intelligence

If data isn't helping your business grow, you don't have a data problem - you have an information problem. The sheer volume of structured and unstructured data pouring into financial services companies today requires updating legacy systems that can't currently handle the volume to support business needs. We help our financial services clients understand what data is useful and what isn't so they can make the right technology choices to enable better forecasting, resource planning, audience segmentation and execute hyper-personalized marketing plans in highly competitive markets. We ensure outcomes measurement is built into your strategic roadmap that we partner with you to enable.

Activating Connected Work for Financial Services

Together, we can drive digital transformation that aligns the teams across your organization to company strategy and objectives so everyone is working from the same page to maximize outcomes and results.

CONNECTED WORK™

THE ESSENTIAL FRAMEWORK FOR THE FUTURE OF WORK

LeapPoint

OUR INDUSTRY CLIENTS

Lincoln Financial Group®

SunTrust

Aflac™

Ameriprise Financial®

BANK OF THE WEST®

UBS

FCCI® INSURANCE GROUP
PROTECTING BUSINESS, PROPERTY AND PEOPLE

Fannie Mae®

FREEDOM MORTGAGE®

Nationwide®

Allianz

COLUMBIA THREADNEEDLE INVESTMENTS

DISCOVER®

Comerica

Northwestern Mutual®

YOUR BIGGEST STEP IS THE NEXT ONE.
Contact LeapPoint to begin a Connected Work assessment.