

# CCI Puesto de Bolsa: Fintech Innovation That Scaled Efficiency and Client Autonomy

x3

increase in user engagement

+30%

investors after implementation

-85%

in time spent on investor inquiries

## Overview

CCI Puesto de Bolsa is a Dominican brokerage firm offering investment products and financial advisory services. Looking to modernize operations and reduce reliance on its sales team, the company partnered with Making Sense to launch a self-service investment platform. The result? A fully digital experience that boosted investor engagement, accelerated growth, and freed up executives to focus on strategic tasks.



## About the Client & Their Strategic Challenges

CCI Puesto de Bolsa is one of the Dominican Republic's top three brokerage firms, serving over 4,500 clients with innovative financial solutions and personalized advisory. At a key growth stage, the company sought to strengthen its position through digital innovation and a more scalable operating model.

To turn that vision into action, the firm sought to:

- Modernize its offering with a digital platform.
- Provide 24/7 access to investment information.
- Enable transaction capabilities in the future.

The key challenges:

- Limited investment visibility for clients.
- Heavy dependency on executives for investment updates.
- Operational overload preventing business development.
- Limited user autonomy due to full dependence on advisors.

Although there was no urgent burning platform, CEO José Fonseca had a forward-thinking vision: **to scale the business through technology—without increasing headcount.** This proactive strategy was essential to stay ahead of competitors already going digital.

## The Solution: A Future-Ready Investment Platform

To address these pain points, Making Sense developed a comprehensive web-based portfolio platform that enables:

- **24/7 portfolio visualization**  
Empowered investors with real-time access to their investment data—reducing repetitive inquiries and freeing up executive time.
- **Digital contract signing**  
Streamlined the onboarding process by allowing users to complete agreements online.
- **Fully digital onboarding**  
Enabled frictionless account creation and faster investor acquisition, eliminating manual paperwork.
- **Self-service account management**  
Provided an easy way to upload documents and manage updates without direct advisor involvement.
- **Real-time portfolio insights**  
Allowed stakeholders to review historical transactions and monitor performance independently.

## Technology Stack

### Frontend



React and NextJS for a modern and flexible architecture.

### Cloud Infrastructure



AWS for enhanced security, scalability, and performance.

### Backend



Python is a versatile programming language used for data processing and automation.

### Methodology



Kanban and Scrum are agile methodologies used to manage workflows and deliver iterative value efficiently.

## Team & Approach: A High-Performance Delivery Engine

The success of this project was driven by a cross-functional team of **21 experienced professionals** from Making Sense, covering all critical disciplines: frontend and backend development, UX/UI design, QA, DevOps, project management, and product analysis. The engagement was structured for speed, flexibility and quality:

- **8-month delivery timeline** from discovery to go-live, enabling rapid go-to-market while ensuring platform stability.
- **Active involvement** from CCI leadership **accelerated decision-making** and helped secure buy-in across internal teams.
- **Clear communication practices**—regular demos, status check-ins, and detailed documentation—kept the project on track and everyone aligned.
- A dedicated task force proactively addressed performance concerns and database limitations, significantly **improving load speed and responsiveness.**

## Key Outcomes and Measurable Impact

This digital initiative generated substantial value for CCI:



### Operational efficiency

- **80–90%** reduction in inquiry time for executives, thanks to self-service tools.
- Internal cost optimization through **automation.**



### Business growth

- **Streamlined investor onboarding:** Before launching the new platform, signing up as an investor was a manual and difficult process. With the new self-registration system, investor sign-ups increased by +30%—a clear signal of improved usability and a meaningful shift toward operational efficiency.
- **3X increase in user engagement** within the first month—signaling strong platform-market fit and validating the product strategy.



### Conversion rates

- Onboarding conversion rate increased by **80%**, jumping from 22% to 40% after integrating digital contract signing—significantly reducing friction and enabling faster client acquisition without manual paperwork.



### Innovation differentiator

- Mobile app compatibility with **Apple Vision Pro** positions CCI as a fintech innovator by adopting cutting-edge spatial computing technology—setting it apart in a competitive market. This future-proofing approach enables immersive user experiences, attracts high-tech early adopters, and signals a strong commitment to innovation.

\* Additionally, the integration of marketing campaigns into the platform's onboarding flow transformed the platform into a lead generation engine.

## Why Making Sense?

CCI selected Making Sense for our **product-centric mindset** and proven ability to turn high-level business needs into actionable, scalable solutions.

What stood out:

- Deep domain knowledge and ongoing learning of CCI's business.
- Transparent roadmapping with quarterly effort estimation.
- A seamless, equal-footing collaboration model.
- Strategic focus on long-term, scalable impact—not just software delivery.

"Working with Making Sense has been a transformative experience. They not only met our technology expectations, but also showed a genuine commitment to excellence, innovation, professional integrity, and strategic partnership. I'm deeply proud of the results we've achieved together."



Deilyn Urdaneta  
Innovation and Development Manager at CCI Puesto de Bolsa

We build strategic advantage.  
Partner with us to scale smarter,  
faster—and with purpose.