



Case Study

From hundreds of gigabytes to a single search bar

Customer
**Financial services
company**

Location
United Kingdom

Industry
**Financial &
Business sector**

Building the platform that replaced the filing cabinet

For a global financial services firm, decades of contract documentation had accumulated into a problem with no easy answer: hundreds of gigabytes of files, no reliable search, and a team managing critical trading contracts through a combination of manual habit and institutional memory. Following a structured discovery exercise that mapped the firm's transaction management workflows and identified the priorities for improvement, Zenitech was engaged to build a document management system designed to bring order, searchability, and structure to that environment.



What was built

The scope centred on the document management challenge identified during discovery: replacing the firm's reliance on an unstructured Windows file system with a purpose-built platform that could handle the volume, complexity, and sensitivity of their contract archive.

As the project progressed and the client's operational needs became better understood, the platform expanded to incorporate trade workflow management — giving the transaction management team a single environment in which to manage both their documents and their day-to-day processes. The result was a more comprehensive system than originally scoped: a platform that connected document storage, search, and workflow management in one place, built to integrate with the firm's existing security and compliance requirements, including full visibility for their internal technology team.

The infrastructure underpinning the platform was built to the client's security standards and underwent review to ensure it met internal requirements before handover. The final system was delivered with frontend, backend, and infrastructure components in place, and code mirrored to the client's own repositories for ongoing oversight.

What they received

The firm received a working trade management platform replacing a 25-year-old manual filing system, one that had required individual team members to spend months at a time tracing errors through hundreds of contract files. The new system introduced structured document management, searchability across the contract archive, and a workflow layer for the transaction management team's daily activity.



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