

I need to . . .

CONSOLIDATE OUR CLIENT COMMUNICATIONS OPERATING PLATFORM

Our client is a large global asset manager with over USD500 billion in assets under management. The firm manages single and multi-asset investment solutions using both active and passive strategies.

The firm consisted of a number of boutique asset managers, and the firm saw an opportunity to consolidate the operating platforms of these boutiques into one unified framework to support the various businesses. The project involved automation and improving the client experience for client communication materials including factsheets, pitch books, client account reviews, and client reports. In addition, the firm wanted to review the functionality of vendors to provide client portals. Each of the boutiques had a mix of vendor and proprietary tools that needed to be evaluated and rationalized.

The firm sought Cutter's expertise to help to assess and select a consolidated solution to meet the requirements of each of the business lines.

CUTTER SOLUTION

Cutter began by conducting extensive interviews with the teams from each of the boutiques to gain consensus on the requirements to support their client reporting and marketing material needs. The following teams were interviewed:

- Client Reporting
- Commentary Management
- Compliance
- IT
- Marketing
- Strategy

Having gathered these insights, and using our independent proprietary vendor research, we identified a shortlist of appropriate solutions, along with detailed insights on the strengths and weaknesses of each option.

Three solution providers were asked to demo their products, and Cutter provided a proprietary scorecard

CLIENT PROFILE

Client Type:

Asset Manager

Assets Under Management:

USD 500 billion

Location:

Global

Cutter Practice:



Client Facing



Systems Search and Selection

in order to assess the functionality in areas such data collection, report creation, distribution, user interface, and technology.

After conducting in-depth demos, two vendors were then invited to complete a comprehensive RFP.

Finally, we sought out client references of the identified finalist.

Within short timeframe, Cutter provided the client with a comprehensive assessment of the various solution options and the ability of the solutions to meet the clients needs across all the boutiques, as well as estimates on costs.

We delivered a clear recommendation for their initiative and a well-defined starting point for implementation, including recommendations around data structures and industry best practices.