

I need to . . .

## DELIVER CLIENT REPORTS EFFICIENTLY

The investment management division of one of the world's largest financial organizations was grappling with their client reporting process. With a global client base, global product offerings, and a broad range of client profiles, the firm needed help managing increasing requirements to conform to regulations, standardize reports for both core products and more complex mandates, and supply custom formatted data to third parties and consultants.

The organization asked Cutter Associates to help them understand their ideal target state and determine which solutions could best solve their specific issues.

## CUTTER SOLUTION

Our Client Facing team gathered requirements while evaluating the organization's existing client reporting technology and processes, including current limitations and pain points. We also benchmarked their capabilities to help them understand how they compared to their industry peers.

Our assessment of the firm's reporting infrastructure revealed several gaps in functionality, processes, and tools. Based on their existing capabilities and on technology enhancements already planned or in progress, we made the following strategic recommendations as part of a pragmatic and implementable plan for their client oriented activities:

- Enrich or build out data masters
- Build or enhance core domain-specific marts
- Establish a reporting mart
- Implement new report rendering tools
- Rethink integration methods within a new technology ecosystem
- Establish an enterprise data management program
- Improve the supply chain

## CLIENT PROFILE

**Client Type:**

Global Investment Manager

**Assets Under Management:**

Over USD 1 trillion

**Location:**

Multiple Global Locations

**Cutter Practice:**



Client Facing

Our client then asked us to stay on to help socialize the recommendations to business stakeholders and senior management.

Once implemented, the client expects to realize the following benefits:

- Improved agility and adaptability to meet client, regulatory, and business needs
- Stronger support for growing products and investment strategies, which in turn supports higher volumes of accounts and client facing materials
- Increased capabilities for adding, replacing, upgrading, or outsourcing components to meet business needs
- Higher quality data, reducing both risks and costs
- More insightful business intelligence, with new structures enabling access to centralized, client-ready, market-ready data
- Clearer data roles and ownership, optimizing employee engagement and alignment