

## CASE STUDY

# Customer Portal for a Leading Investment Consulting Firm

### About the Customer

The company is one of the industry's largest independent, full-service investments consulting firm headquartered in Massachusetts. It provides asset management, investment advisory and investment policy administrations services to enterprises, non-profit organizations and individuals and manages assets of over \$800 billion.

### Executive Brief

The customer was embarking on two key initiatives, which included automation of investment manager search book and launch of new discretionary services portfolio. Both these initiatives were mission critical for overall success with institutional and private wealth investors. Trigent played an instrumental role in rolling out the Automated Search Book program & Discretionary Services program.

## Automated Investment Manager Search Book

### Business Challenge

The customer advised clientele in searching, evaluating and reporting investment options and finding investment managers based on performance criteria. The customer followed ad-hoc processes to conduct this research, create a comprehensive search book and publish this to their clientele. The Investment Manager Search process follows a rigorous four steps: Initial Screening, Quantitative Review, Qualitative Review and Formal Written Analysis. All along these steps, the process involved manual data collection from various sources, analysis and preparing detailed reports and presentations that result in the final book to be presented to the clientele. The system needed have integrations with a variety of external systems to bring the analysis data, flexible enough to customize the book, yet enforcing the formatting and presentation standards to confirm the brand identity. This manual process used to take few days to a week to complete one book – greatly limiting their ability to scale and grow.

### Business Solution

Trigent built a self-service application to automate the complete Search Book generation and publishing process. We leveraged customers existing investment to integrate with line of business systems & composite applications to bring data and analytics. The application utilizes desktop applications such as Word, PowerPoint to

#### Technologies

- ✓ Microsoft SharePoint
- ✓ .NET
- ✓ OpenXML
- ✓ HTML

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author several sections of the book. A simple wizard like step-by-step interface guides the users through a well-defined process. The system also allows users to save their preferences and override inputs for controlled customization of the book.

### Discretionary Services

#### Business Challenge

With launch of its Discretionary services portfolio, consultants were expected to make investment decisions on client's behalf thus increasing the risks, compliance & processes to be followed. The customer did not have any system, which would help its advisors to methodically & accurately carry out the expected functions.

#### Business Solution

We built a web based platform which would keep consultants up-to date on customers investments, trade tickets, etc. The platform facilitated workflow automation & instant notifications to investment advisors, thus empowering them to take accurate & informed decisions on their client's behalf.

#### Technologies

- ✓ Microsoft SharePoint
- ✓ C#.NET
- ✓ SQL Server
- ✓ OpenXML
- ✓ HTML

#### Benefits

- ❑ Customer relationship managers could respond faster to their client's demands for information
- ❑ The search book generation time was reduced to few hours from weeks
- ❑ High conformance to branding standards
- ❑ Reduced paper work and negligible manual processing.
- ❑ Improved operational efficiency and accuracy
- ❑ Up to date information on performance criteria