

# Fund Marketing Services

## US-based Asset Manager

**\$2.4m**

annualized cost savings

**30%**

decrease in turnaround time

**>30,000**

reports generated per annum

**100+**

automation tools developed

### CLIENT CHALLENGES

A global asset management firm required support in generating various reports, such as factsheets, presentations, brochures, client reports, and other Excel-based reports. It expected large volumes and wanted to ensure a quick turnaround with consistent quality. However, the client was facing the following challenges:

- » Lack of bandwidth to handle quarterly volume peaks and increased demand from sales for new sales collateral
- » Lack of sophisticated database, issues with data quality, and coordination with multiple teams, which delayed time to market of reports

The client required a partner with proven expertise in fund marketing support, coupled with technology expertise, who could help deliver a profitable strategy

### OUR APPROACH

- » Assisted the client in designing a centralized database to plug data from various sources, including financial data providers
- » Acted as a central team and coordinated with various teams to source data
- » Automated data collation, validation, and reporting for a standard set of reports to improve report quality
- » Used Acuity Knowledge Partners Report Generator, a proprietary tool, to automate report generation
- » Streamlined processes and eliminated unwanted/manual subprocesses to reduce turnaround time

### IMPACT DELIVERED

- » Deployed a multidisciplinary team with domain experts from fund marketing, data analytics, technology, and DTP
- » Implemented an efficient work-flow management system to improve turnaround times and data tracking, resulting in effective project management
- » Leveraged our experience in working on similar processes with other global asset managers and implemented best practices
- » Implemented strong governance framework to provide strategic guidance to the engagement

#### About Acuity Knowledge Partners

Acuity Knowledge Partners, formerly part of Moody's Corporation, is a leading provider of bespoke research, analytics, staffing and technology solutions to the financial services sector.

Headquartered in London, Acuity Knowledge Partners has nearly two decades of transformation experience in servicing over 300 clients with a specialist workforce of over 2,500 analysts and delivery experts across its global delivery network.

We provide our clients with unique assistance not only to innovate, implement transformation programmes and increase operational efficiency, but also to manage costs and improve their top lines.

These services are supported by our proprietary suite of Business Excellence and Automation Tools (BEAT) that offer domain-specific contextual technology.

Acuity Knowledge Partners is assisted by Equistone Partners Europe, a leading private equity organisation that backs specialist growth businesses and management teams.