

Restructuring client reporting process for a top-15 private asset manager

Enhanced

Investor Confidence

~25%

client analysts utilized
additional time created

~50%

increase in coverage

CLIENT CHALLENGES

- A global top-15 private [asset management firm](#) with operations in the US, UK, Europe and Asia Pacific required help to review its [client reporting](#) process, identify challenges, implement best practices and set up a robust reporting process

OUR APPROACH

- Knowledge gathering: Conducted a detailed process review where Moody's subjectmatter experts (SMEs) met with 25 analysts to understand the current client reporting process
- Documented process steps to ensure consistency in completing client reports after transition to Moody's
- Set up a dedicated [client reporting support team](#) to deliver all ongoing reports
- Automated data sourcing resulted in delivery of betterquality reports on time, with minimum manual intervention

IMPACT DELIVERED

- Absence of a knowledge repository and [workflowtracking](#) mechanism
- Manual data gathering from multiple internal data sources
- Multiple analysts and teams involved in completing the reports
- Less time to focus on core activity, i.e., relationship building
- [Restructuring Support for Investment Banks](#)

About Acuity Knowledge Partners

Acuity Knowledge Partners is a leading provider of high-value research, analytics and business intelligence to the financial services sector. The company supports over 650 financial institutions and consulting companies through a team of over 6,000+ subject matter experts who work as an extension of the clients' teams based out of various global delivery centres.

We empower our clients to drive revenues higher. We innovate using our proprietary technology and automation solutions. We enable our clients to transform their operating model and cost base.