

Centralization and Automation of Updates

A global asset management firm wanted a centralized team for CDB updates. Each region updated its CDB separately. The client needed support for initial data aggregation and consolidation, intermediate calculation, validation, and uploading to the target databases

CLIENT CHALLENGES

- Lack of consistency in [CDB updates](#) due to multiple teams updating the websites
- Multiple data sources and formats
- Consumption of a lot of time in the manual data formatting process during a busy quarterend reporting period
- Inability of the client team to update the consultant website in a timely manner due to its lack of capacity

OUR APPROACH

- We deployed CDB experts to support the client teams in the US, Europe, and APAC
- Conducted white-boarding sessions to better understand the client's data sources, formats, data availability, and gaps
- Automated data aggregation and the formatting process
- Implemented an efficient [workflow management system](#) to improve deadline, data tracking, and effective governance

IMPACT DELIVERED

- The centralized CDB operations resulted in a significant process efficiency gain (approximately 20%) and enhanced the client's product visibility
- The client also benefited from a fully implemented process to answer each database consistently, accurately, and efficiently
- Automated