

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

~50%
increase in coverage

~25%
client analysts utilized
additional time created

Enhanced
Investor Confidence

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

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