

Setting up a client services team for a global asset manager

~98%accuracy of reports
overall**~USD1.5m**

in the past 5 years

~80%bandwidth for the
client reporting team

CLIENT CHALLENGES

- A global [asset manager](#) with over USD800bn in AuM required an offshore partner to assume complete responsibility of its [client reporting](#) suite across regions

OUR APPROACH

- Set up a centralized data vault
- Leveraged Moody's client report generator to deliver bespoke client reports within a shorter TAT
- Customized multiple widgets for quick reporting
- Introduced dual-phase validation to ensure accuracy
- Handled client queries:
 - Managed client mailbox
 - Maintained a strict 'within a BD TAT for more than 80% of client requests

IMPACT DELIVERED

- Sourcing data from multiple locations and manual data updates led to inaccuracies
- Upheavals in reporting templates and tighter deadlines
- Attrition within client teams led to service disruption and reduced knowledge retention
- Lack of access to technology/