

# CDB Updates for a Top 15 Global Asset Manager

A top 15 global asset management company based out of Boston required support in updating data on consultant databases (CDB) update over 5,000 profiles in a year, covering more than 30 consultants, including online data submissions and manual data requests

CLIENT CHALLENGES	OUR APPROACH	IMPACT DELIVERED	BENEFITS
<ul style="list-style-type: none"> <li>» Bandwidth constraints to carry a large number of uploads during a busy quarter-end reporting period</li> <li>» Inability of the client team to update fixed income characteristics due to difficulties in data sourcing</li> <li>» Multiple data sources and formats for different data categories</li> <li>» Low product visibility in manager searches due to poor data quality and delays in uploads</li> </ul>	<ul style="list-style-type: none"> <li>» Data sourcing and aggregation</li> <li>» CDB uploads, questionnaires, and ad hoc data requests</li> <li>» New fund profiles registration and historical data uploads</li> <li>» AuM reconciliation and publishing</li> <li>» Periodic data audits</li> </ul>	<ul style="list-style-type: none"> <li>» Conducted white-boarding sessions to understand the client's data sources, formats, availability, deadlines and gaps</li> <li>» Automated various intermediate processes related to data sourcing and formatting, and AuM break-up calculations</li> <li>» Set up data templates for fixed income characteristics and allocations</li> <li>» Centralized a data store for quick data access</li> <li>» Implemented an efficient work-flow management system to improve deadline, and data tracking, and effective governance</li> </ul>	<ul style="list-style-type: none"> <li>» The centralized and automated CDB uploads process resulted in a significant process efficiency gain (approximately 40%) and enhanced the client's product visibility</li> <li>» The enhanced CDB coverage and a fully implemented process to answer each database consistently, accurately, and efficiently</li> </ul>

## 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.