

Private Equity (Co-Investments Monitoring)

Global PE FOF Firm Headquartered in the US

5+

years of partnership

~\$2-3m

in cost savings

3

member dedicated desk
of analysts

4

client offices supported

CLIENT CHALLENGES

- » A leading global FoF manager with around \$11bn of AuM across its 5 funds was looking to migrate co-investments data to an online platform to easily monitor and update data on a regular basis
- » The client extensively used its internal team to manage and monitor a large portfolio of co-investments
- » The monitoring exercise involved sourcing, aggregating, and scrubbing relevant reporting materials, thereby engaging its internal team extensively
- » Of the total, 80% of data was saved in silos, impeding real-time availability of data for analyses and reference
- » Acuity Knowledge Partners partnered with the client in 2011 to migrate the entire data on the customized platform based on Salesforce and provided the following benefits:
 - Our experienced research team managed data migration across the new platform and provided customized dashboard reports as required by fund managers
 - We also provided efficient turnkey solutions for the client to reduce the high cost of storing and updating data on a regular basis

OUR APPROACH

- » Identified key client objectives and prepared a detailed roadmap with tangible milestones
- » A senior team member travelled to the client site for a week to analyze the data onshore and discuss key objectives with the client team
- » An offshore team uploaded the data (PDF documents, scanned documents, etc.) to Salesforce using best data migration practices
- » Implemented strong quality check processes to ensure that data quality was 100%. The project team is now mandated to manage data

IMPACT DELIVERED

- » Aligned industry/product teams to provide value-added support with strong integration
- » Enabled the client to migrate to a new platform without investment in an onshore workforce
- » Facilitated the client with competitive advantage using a robust functionality platform to store and analyze data
- » Saved USD2-3mn in costs over the last 5 years

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.