

Today's industry challenges require an asset manager to have an operating model that has the agility to solve for rapidly evolving business needs.

Olmstead's **Operational Agility Review** will quickly provide a broad-based view of your organization's strengths and challenges in flexing the operating model to address future demands that inevitably, and often unpredictably, will head your way.

What is the OAR framework?

Olmstead's OAR framework consists of a series of operations, data and technology reviews targeted on strategic processes. It provides an end-to-end review from front office/client-facing delivery through back office sourcing and execution.

Who can benefit from an OAR study?

New CEOs or COOs seeking an independent assessment of their operations, asset managers undergoing M&A activity, and those in need of an outsourcing or technology assessment are all excellent candidates.

How does the OAR framework differ from other operational reviews?

Historically these reviews were executed in silos focusing on a specific business component. Although slight efficiency gains may have been achieved, they often fail to benefit the end consumer.

What is the outcome of an OAR study?

An OAR study will produce a list of actionable initiatives, a strategic roadmap, and will benefit from the use of one or more of the transformation levers below.

OAR Focus Areas

DATA

Access, storage, enrichment, governance

PEOPLE

Skills assessment, utilization, org design

PROCESS

Operational efficiency, target model, workflow optimization

TECHNOLOGY

Platform review, technology assessment

Transformation Levers

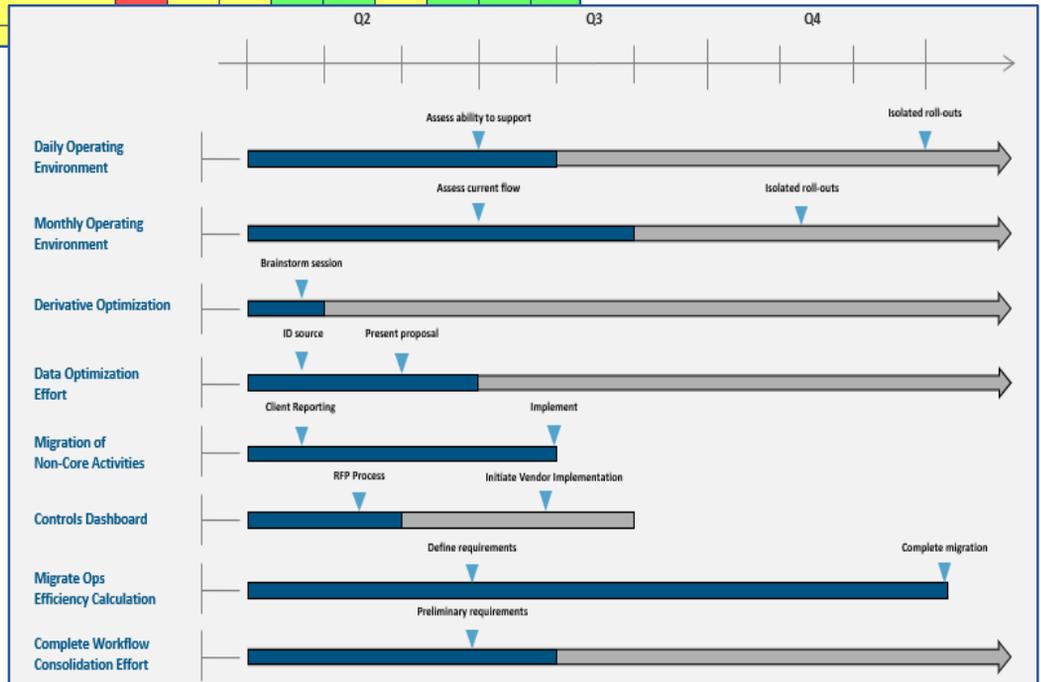


An OAR Study results in a set of comprehensive and actionable outputs enabling future initiative planning.

OAR Rating	OAR Rating										
	Scalable Operating Model	Global Operating Capabilities	Comprehensive Data Strategy	Disciplined Data Governance	Flexible Reporting Capabilities	Scalable "Best in Class" Tech	Robust Operating Me	Transparent	Abv		
Middle Office											
Security Reference											
Trade Operations											
Trade Allocation											
Trade Matching											
Trade Notification											
Trade Repair											
Failed Trade Reporting											
Claims Management											
Settlement Instructions											
Portfolio Acct/Cash											
Corporate Actions											
Derivatives											
Pricing											
Reconciliation											
Performance											
Client Reporting											
Back-Office											
Fund Accounting											

The OAR dashboard provides a view of your firm's operations and highlights areas of concern. The dashboard is accompanied by a summary report which outlines details supporting the scoring and also provides a qualitative assessment with recommendations

The OAR strategic roadmap provides a path forward for execution



Is your business positioned for change?

Reach out to Olmstead Associates at info@olmst.com for more information