

The Data Readiness Challenge & Keys to Unlocking Your ROI:

Client communication solution implementations are data projects as much as they are reporting projects

Client Communication Implementation Approaches:

Common Approach: Serial Data Readiness



Outcome: Delayed Business Impact
✓ Longer than desired time to value

Common Approach: Lack of Strategic Data Readiness



Outcome: Muted ROI
✓ Higher ongoing risk & maintenance
✓ Difficult to fully leverage the platform's benefits

Olmstead Data Services: Parallel Data Readiness

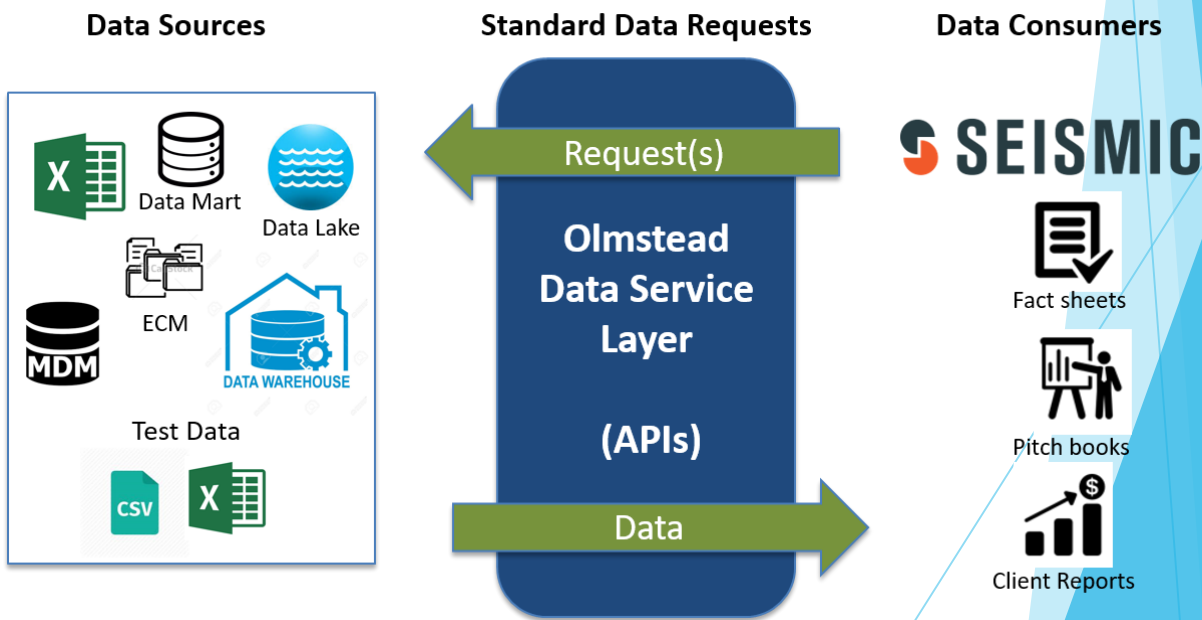


Outcome: Unlock ROI
✓ Accelerate implementation and go-live
✓ Improved data readiness
✓ Create platform for growth & scalability

Olmstead has developed a set of *Implementation Accelerators* that optimizes Client Communications initiatives:



Olmstead's Data Services are pre-configured to integrate with Seismic's asset management data model and allow report development to start in conjunction with data readiness activities. This results in parallel work streams to speed data preparation, report development, and QA while creating a centralized source of data for pitchbooks, factsheets, & client reporting.



"We are happy to welcome Olmstead as a Seismic Edge Partner. Partnering with asset management domain experts like Olmstead aligns with our top priority of serving customers in a manner that will consistently exceed their expectations."

Kevin Chew – VP, Business & Corporate Development, Seismic

Distribution Enablement Model

Distribution Intelligence



Sales & Marketing Enablement



Client Experience Solutions



Distribution Data Platform

Prospect

Pitch

Win

Onboard

Delight

Grow

Transition

Olmstead is a leading specialized data-centric consultant serving the asset management industry, enabling firms to improve agility, scale profitably and manage risks by providing actionable strategies and expert execution

- 25 years acting as a process-driven, results-driven, pragmatic partner propelling our clients' success
- Strong focus on delivering client communications solutions
- Dedicated to driving **operational agility** into the asset management industry, using a unique **data-centric** approach focused on 2 primary industry challenges:



Operational Alpha:

Transforming outdated investment operations operating models & technology stacks to support the investment manager's growth and profitability goals



Elevated Client Experience:

Creating integrated sales and service models to elevate client engagement, impact sales, and optimize the client experience

Contact Kevin Trimble for more information on Olmstead's Client Communications Data Services

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