

Intelligence Engine Improves Operational Efficiencies and Customer Experience for an Investment Consulting Firm

Client

The client is one of the largest independent, full-service investment consulting firm servicing 300+ retainer relationships, representing assets of \$1.5 trillion with approximately \$65 billion in alternative assets. Their expertise spans asset allocation, traditional investments, private wealth, endowments, foundations, and insurance assets.

The company evaluates and provides advice for portfolio management such as private equity, real assets, and hedge funds. The client relied on a legacy portal which helped investors to search and identify fund managers who would create customized investment plans and

invest on their behalf. Advisors, then, manually pulled out data on existing customers, used forecasting tools, and created presentations of similar investments and presented this data in a graphical format.



Faster response to clients from Weeks to Hours

Business Challenges

- Customers were unhappy with the lead time to design customized investment portfolios.
- Manual data retrieval from different data sources including third-party systems.
- Lack of data integrity and long-winded processes for data integration.
- Human errors led to customer dissatisfaction and regulatory non-compliance.

Solutions

Trigent recognized the need to automate business processes to:

- Enable customers to find the investment manager of choice.
- Provide seamless access to information residing in disparate systems.
- Reduce the time required to build the customized investment portfolio.
- Search, retrieve, analyze, and present the data to a predefined logic in a faster and better way.
- Provide the customer easy access to an investment portfolio.

Delight end-users with an intelligence engine to automate workflows and self-service portal

The user-friendly self-service portal provided access to the data the customer needed to take fast and informed decisions. The portal, compatible with multiple browsers and devices, provided superior customer experience and access anytime, anywhere. The intelligence engine helped the investment managers to quickly and efficiently design customized investment portfolios by automating multiple manual tasks and workflows. It would search, retrieve, analyze, and represent the data according to predefined logic, which also helped in reducing human errors. The intelligent application was designed on the .NET framework, supporting the platform to 'talk to' different systems and brought a new level of user experience for the application.

Trigent's engineers seamlessly integrated disparate data sources to reduce the time and effort required to access the data. This included eVestment, which helps investment managers to identify and capitalize on global investment trends, and Microsoft Dynamics 365, their CRM system to access existing customer data. Integration Services packages (SSIS) were created for data extraction, transformation, and data warehousing.

Technology Stack

- **Platform:** ASP.NET, C#, MS Visual Studio 2017, IIS
- **Frameworks:** .NET Framework 4.x
- **Server Operating System:** Windows Server 2012 R2
- **Databases:** MS SQL Server 2014 SP3

Benefits

- Track, aggregate, and visualize key performance indicators.
- The search book generation time was reduced to a few hours from weeks, helping asset managers to respond faster.
- Reduced errors by 70%, improving regulatory compliance.
- Enhanced client services and reduced costs.
- Empowered investment managers with accurate data to make decisions faster.
- Improved operational efficiencies upto 80%.
- Integration with data feeds results in 100% information accuracy.

The intelligent application plugs in data automatically in PowerPoint slides, easily accessible to the customer via the newly built portal. A wizard-like systematic interface guides the users through the process. It also allows users to save their preferences and override inputs for controlled customization of the investment portfolio, resulting in reduced paperwork and negligible manual processing.

The application offered customers an integrated, intelligent and automated Investment Manager Search and Discretionary services.

Investment Manager Search Application

This application helps customers to search, evaluate and identify suitable investment managers. The system auto-generates quantitative and qualitative information, and formal analysis.

Discretionary Services

This function empowers client's asset managers to make investment decisions on behalf of the customers. The application negates all forms of risk and adheres to regulatory compliance. The user-friendly application helps advisors to derive intelligence from ten years of data to methodically and accurately offer investment plans for customers.

“Trigent helped our investment managers to respond quickly to inquiries resulting in nearly 100% growth in customer base within six months.”