

Case Study

Faster and More Flexible Reporting Capabilities

An Asset Manager's Success Story



THE CLIENT

Asset management firm of a major mutual fund complex in the United States. Their clients include some of the world's largest corporate and public pension plans, financial institutions, endowments, and high net worth individuals. The client uses a report repository to manage their compliance and portfolio analytics reporting needs.

CHALLENGES FACED BY CLIENT

Increasing backlog – Due to the increasing demand for reporting, there was a growing backlog of requests from business users that was challenging to address in a timely manner.

Lack of flexibility – Due to their backlog of work, it was challenging for the client to efficiently ramp up and ramp down resources to meet fluctuating reporting requirements.

Longer Turnaround Time – The technology team had to focus on enhancements in addition to reports, resulting in slow turnaround when there was a high volume of reporting requirements.

UBTI'S REPORTING SERVICES

NEW REPORTING REPOSITORY

END USERS



UBTI syncs multiple data sources to deliver seamless reporting to end users.

SOLUTIONS

The firm opted for UB Technology Innovations' (UBTI) onsite-offshore model. By having a UBTI Technical Engagement Manager (TEM) onsite overseeing a dedicated offshore team, the client is experiencing numerous benefits:

- UBTI now addresses all requirements that arise throughout the day. This has increased end-user satisfaction due to correct and timely reporting.
- When faced with critical requirements in EOD, the offshore team works in a follow-the-sun support model to have the reports ready before the beginning of the client's next business day.
- The new user-friendly reporting solution has decreased turnaround time, reduced costs, and the client's technology team now has more time to focus on transformational projects.