

Transforming Investment Data Operations for a Leading Investment Firm

Key Challenges



Client escalations due to delays and inaccuracies in reports stemmed from:

- Unstructured data formats
- Unclear process definitions
- Legacy systems
- Lack of focus on process improvement

Business Solution



Incedo implemented a multi-pronged approach:

- Process simplification and optimization: Redesigned workflows for real-time monitoring and proactive data collection
- Outsourcing and rightshoring: Defined a phased transition with global delivery for cost reduction
- Built an audit monitoring tool and automated data aggregation using RPA

Business Impact

60%

cost reduction through global delivery



Up to 98%

improvement in program accuracy

Up to 92%

improvement in Data readiness



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