



Global Private Equity Firm

An asset management company renews focus on their most important relationships

Ciber's client is a global, integrated, full-service asset management company providing due diligence and analysis, asset management and global support services for a leading private equity firm with aggregate capital commitments totaling over \$65 billion. While this Global Private Equity firm enjoyed high levels of annual growth, their investor relations database hadn't kept pace.

A need to modernize investor relations

The client contracted Ciber as their strategic development partner for an initiative to upgrade the technology platforms supporting the company's global investor relations and other related business systems. Continued growth exposed a need for more efficient systems that were better connected.

This Global Private Equity firm's existing investor relations system was a 14-year-old database application developed in house. Managing investor engagement was complicated and time consuming, especially for investor relationship managers who are often on the road during capital generation periods.

Processing transactional data involved many disparate databases and spreadsheets that were time consuming and it required multiple validators to achieve accuracy.

Two powerful partners form a single, robust platform

Ciber drew upon our longstanding Microsoft[®] partnership to formulate a new Investor Relations Management (IRM) platform that would integrate data, information and processes to deliver one centralized view of key relationships, fund data and business performance across the entire global reach of the client's enterprise.

This new IRM system combines the flexibility of Microsoft's leading customer relationship management software, Microsoft Dynamics CRM Online, and their hosted data services with Ciber's financial industry-specific accelerators and configuration knowledge. The resulting solution provides data access and complete information sharing across departments, investment strategies, channels or portfolios to support many operational needs.

- **Contact Management:** Comprehensive contact management includes single contact views of related data and activities, and real-time, anywhere, any device access.
- **Mobility:** Complex, current investor data is easily accessed on mobile devices and can be viewed as aggregated investor data to provide crucial information when meeting with prospective investors.
- **Fundraising:** The organization's associates can engage prospective investors armed with accurate, real-time investor data that's accessible with just a few taps on a smartphone or tablet. Features include multiple closing, bulk processing, funding caps and auto calculated investment 'hair cut', with real-time forecasting across investment vehicles.
- **Transactions:** Transactional data is processed more efficiently and accurately within the new IRM platform replacing a manual spreadsheet processes. Maintaining up to date and accurate investor ownership data also enables a structured validation process and single-click contribution calculations for investor capital calls.
- **Notifications:** Dynamic, investment-specific notifications can be generated from transactional data, and a template feature allows non-technical users to maintain, edit and create new notifications from within the user interface.
- **Reporting:** Dashboard capabilities provide real-time data visualizations with mobile-specific interfaces for smartphone and tablet users. Various custom reporting features are also built in for specific business needs.

- **Transfers:** Investor transfers was one of the most complex areas addressed. Tasks that previously required analysts to manually enter large amounts of redundant information are now possible by entering a few key pieces of information. Full, partial and split transfers are fully supported and automated.

New technology delivers enterprise-wide results

With a new IRM system that can capture contact information, track interactions, control documents to ensure regulatory compliance and centralize information access, the client has seen a surge in productivity and in customer confidence.

Significant improvements in data accuracy and increases in operational efficiency have been realized across all areas of business thanks to the automation of complex processes supported by multiple built-in checks and validations.

User access to accurate data in real-time, when and where it's needed, is delivering added features, such as real-time reporting. It's also enabling mobility access for relationship managers who are now going out and fully engaging with investors all over the world.

The whole solution is also future proofed. Support for new funds is designed right in, so the client will be able to increase scale and scope of operations with minimal configuration and without a need for extensive custom development.

About Ciber

Ciber is a consulting, outsourcing and business solutions integration provider with offices across North America and India. For more than 45 years, Ciber has served clients by delivering expertise, IT services, and solutions that transform organizations and provide tangible business value. Ciber's strength is now enhanced by its parent company, HTC Global, a growing technology innovation and execution leader. HTC Global helps clients reimagine technology to accelerate their business.