

Alternative Asset Manager

Restricted Entity Process

Challenge

The client is one of Europe's leading alternative asset management organisations. Growing at significant pace, the solution used to track restricted entity information became unmanageable, complex spreadsheets containing unreliable data.

This business-critical process needed to find a balance of providing accurate information to ensure regulatory compliance, whilst not reducing income opportunities for the business by restricting teams unnecessarily.

Solution

The initial engagement with psKINETIC was a 6-week project to understand the problem, provide a data cleanse roadmap and outline an MVP solution. The objective was to enable the team to easily maintain a more structured and reliable data set going forward.

Virtual SME workshops and interviews with key stakeholders were used to analyse issues in the data and processes. In parallel, detailed analysis and automated cleansing of the dataset took place. Through these activities, a new data model was defined that correctly mapped the complex relationships between restricted entities & NDAs.

This rolled into the development of a POC application to start testing the cleansed data model against Hayfin use cases and uncover further requirements. The project was concluded with a design and implementation plan of a new solution to transform the existing processes.

Outcome

- A new solution that can be delivered in 7 weeks.
- A new tracker to the new data structure in the interim to immediately improve the current process.
- A solution that can be extended to further use cases.

psKINETIC is a leading provider of Intelligent Automation Solutions for Financial Services.

Our focus is on delivering outcomes and financial return for clients at pace. We don't believe in 'just rip out and replace' – it is too risky and too costly – with our Intelligent Glue we help clients connect and enhance existing systems and processes. Our experienced professionals master a range of automation technologies and we support customers through the full cycle of Design, Build, Run & Optimise.

For more information, visit www.pskineti.com

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