incedo

Transforming Investment Data Operations for a Leading Alternatives 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

20%+
additional cost reduction from efficiency gains

40% to 98%
improvement in program accuracy

39% to 92%
improvement in Data readiness improved from

Request the Full Story

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