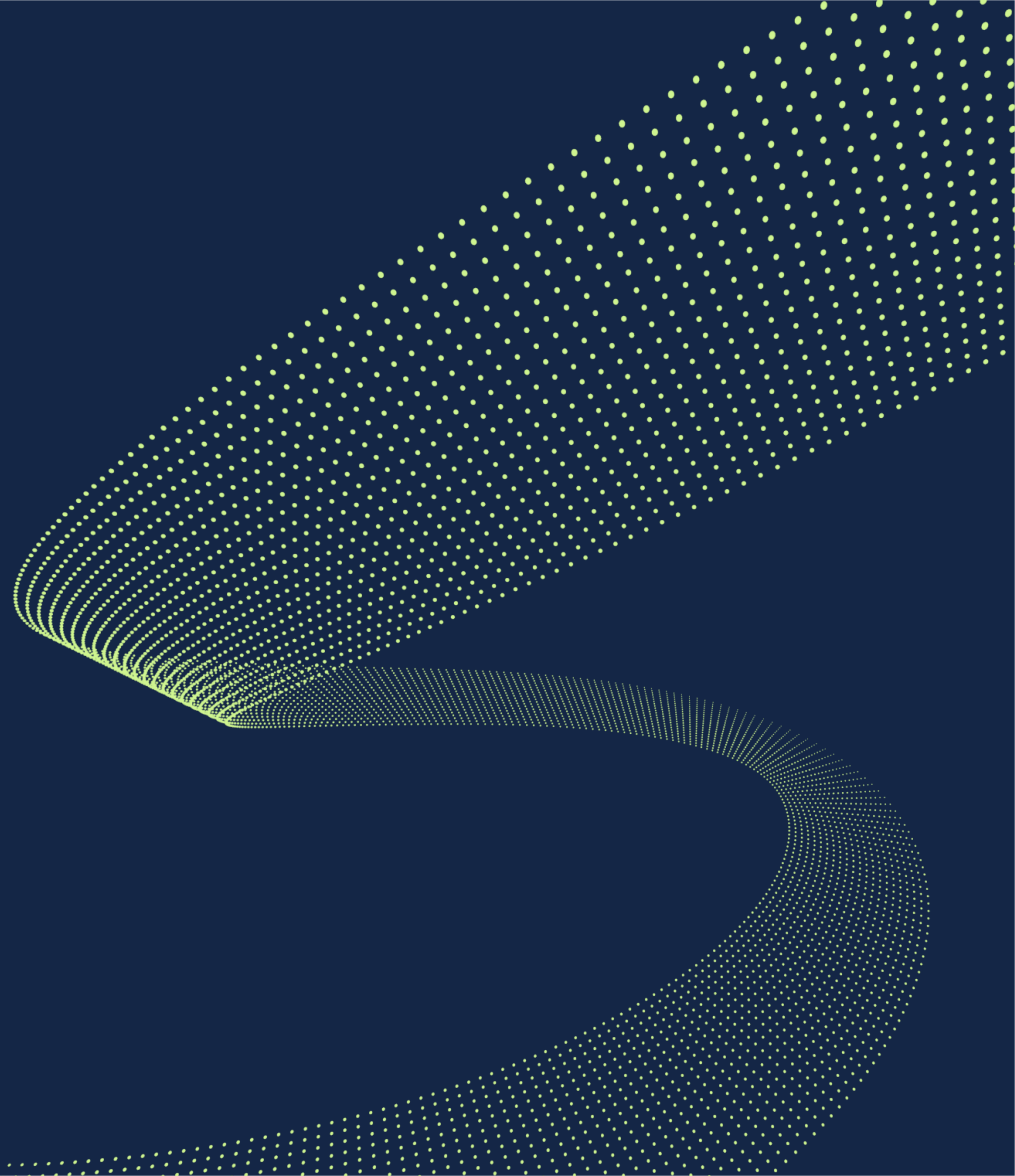


Leading Global  
Asset Manager  
Designs and Delivers  
Cutting Edge Client  
Communications  
Strategy

Citisoft



# The Challenge

For nearly two decades, Citisoft has partnered with a leading global investment management firm to address their evolving business strategy needs through the design and delivery of a series of transformation programs to ensure their client communications function remains aligned with their changing requirements.

In the early stages of our partnership, our client grappled with a manual, global operation, which posed significant obstacles to their growth and caused inefficient reporting practices. Over 20 years, our client has worked to transform their client communications platform, iterating on enterprise demands, introducing automated processes, as well as consolidating and addressing technical debt. Throughout their evolution, our client wanted to work with a partner who is intimately familiar with the existing operational ecosystem.

# The Project

From the consolidation of digital communication channels to the realization of standardized data components, Citisoft's partnership with the client has been characterized by a series of iterative transformation programs.

## Major Deliverables

- Current state assessment of client communications
- Proposal for future state design
- Design and implementation of new data repository
- Catalog data models and construct data domain
- Assemble reports and supporting data via reporting platform
- Build APIs to support data consumption channels



## *Phase 1*

Our engagement with the client aimed to transform client communications from a manual, decentralised operation to a streamlined, cohesive ecosystem and platform. Citisoft worked with the client to frame the vision, design, and objectives of the transformation, settling on a collection of component-based systems that would work together to deliver automated, end-to-end client communication processing functionality.

Citisoft's initial focus was on the new data repository component of the platform, which would serve as the central source of structured data for all communications. In parallel, we partnered with the client on the implementation of an external vendor solution as the primary client communications rendering tool. Our involvement in both aspects ensured the successful establishment of the repository and the rollout of reporting functionality across the platform.

Following the successful delivery of our first engagement, challenges emerged over time and our client encountered new enterprise-level demands on their client communications platform. Originally designed to serve institutional reporting requirements, the platform had expanded to cater to retail communication needs, and was now handling substantial volumes of documents, servicing clients across EMEA, APAC, and North America.

Despite scaling rapidly to support business growth, the platform's infrastructure needed to evolve to meet more sophisticated market and client reporting demands—including heightened client service expectations, platform fragility, and data quality issues. Technological and vendor challenges also began to mount, leaving our client exposed to vendor risk, key man dependencies, and data inconsistencies that further hindered platform effectiveness.

**These factors prompted the need for a future state strategy that would accommodate multi-channel, on-demand access for faster report production cycles.**

## *Phase 2*

Following the identification of a future state for client communications, Citisoft was engaged to support in both producing and maintaining the program plan as well as lead execution and implementation.

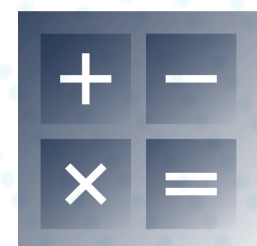
The Citisoft team worked to document the specific reporting needs of stakeholders across the enterprise, including product, compliance, and marketing. With these requirements identified, Citisoft proceeded to define and construct reports by determining required data elements.

Close collaboration with performance and analytics teams ensured firm-wide alignment on strategic data sourcing for long-term sustainability. To support these requirements, Citisoft, working in tandem with our client, designed and delivered a robust data ecosystem. We established flexible interim solutions to expedite program delivery, ensuring all necessary data was accessible and catalogued in the data warehouse.

Throughout the project, a major focus was on building reusable components within the reporting platform. This was achieved through standard data structures, formats, and components. By ensuring reusability, efficiency was maximized, and future report-building efforts were streamlined.

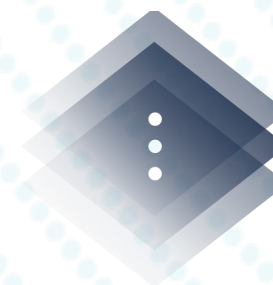
# The Result

Through Citisoft's strategic partnership and comprehensive approach, significant client communication goals were met, driving tangible benefits and fostering lasting changes that continue to contribute to the client's ongoing success.



## Enhanced Operational Efficiency

By streamlining manual and decentralized communication processes, Citisoft enabled the client to achieve notable improvements in operational efficiency. Automation of client communication processing and the establishment of a centralized data repository reduced manual efforts and eliminated inefficiencies, leading to faster report production cycles and enhanced resource utilization.



## Improved Data Accessibility and Quality

Citisoft's work in delivering a robust data ecosystem facilitated improved data accessibility, accuracy, and consistency. Through the implementation of standardized data structures and formats, as well as the establishment of rigorous data governance practices, the client gained greater confidence in the integrity of their data.



## Enhanced Client Experience

The transformation of the client's communication platform enabled them to deliver an enhanced client experience through improved multi-channel access and analytics capabilities. With Citisoft's expertise, our client continues to address budding reporting demands whilst expediting program delivery.



## Sustainable Long-Term Solutions

Citisoft's focus on building reusable components within the reporting platform ensured the sustainability and scalability of the implemented solutions. By adopting standard data structures and formats, the client gained agility in adapting to evolving business requirements.



## Continued Collaboration and Support

Beyond the initial engagement, Citisoft continues to collaborate closely with the client, providing ongoing guidance to further optimize and enhance their communication platform. This long-term partnership supports the client's ability to evolve their client communications strategy by maintaining a seamless transfer of institutional knowledge and offering them the ability to quickly scale their team as new requirements arise.