



Allocating Resources Where They Count

At IMSS, we believe in getting the most ROI when working with clients. It is essential, especially for smaller firms, to allocate their time and internal resources wisely, while maximizing visibility and attracting potential investors.

THE CHALLENGE

Managers are often challenged with decisions when it comes to prioritizing the allocation of time and resources to get the best ROI for their database reporting efforts.

Understanding how databases collect and use manager data can be valuable to already time-constrained firms.

In our experience, not all databases are suitable for every client and resources should be allocated where the ROI value is greatest.

THE APPROACH

Our team discovered that our client had been reporting to two European databases that proved to be ineffective for several reasons.

After discussions with the databases, we learned they required a significant financial investment from clients to gain visibility to potential investor search activity.

Given the lack of suitability and the associated costs, it became apparent that our clients were putting their efforts and resources into platforms that did not provide meaningful exposure or align with their strategies.

\$1.7B

ASSETS UNDER MANAGEMENT

18

DATABASES MANAGED

21

EMPLOYEES

5

STRATEGIES

THE SOLUTION

To optimize our clients' database reporting strategy and gain the most ROI, IMSS made several recommended changes to the list of databases where the client was reporting.

Our focus is to save our clients time and money, while giving them the most visibility to search activity. Our recommendation was to discontinue these two databases altogether and provide additional options that were a better fit. Our primary goal was to ensure that our clients were investing their hard-earned money where it would have the most significant impact on winning business.

At IMSS, we firmly believe in the principle of quality over quantity to get the best results for our clients. Rather than chasing a high number of databases, we sought to identify alternative solutions that would offer the most ROI and the best fit. By carefully evaluating the available options, we suggested databases that closely aligned with our clients' objectives and targeted investor base.

THE RESULT

With the discontinuation of the recommended databases and the addition of more targeted alternative options, our client was able to optimize their resources and time.

The re-allocation in reporting to more appropriate options brought our client increased visibility to potential investor searches they may have otherwise been missing and a higher likelihood of winning new business.

Firms are often challenged to make strategic decisions about resource allocation, specifically when it pertains to database outsourcing and reporting. By embracing quality over quantity and aligning resources where they matter the most, our client was able to increase their access to opportunities to raise AUM.

Outsourcing consultant database reporting can be immensely valuable and cost-effective to managers when working with a knowledgeable and experienced team.

**You've got the data.
We have **the experience.****

IMSS simplifies data reporting by helping managers expedite the delivery of data to consultant databases globally.

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