

Transforming a Boutique Firm's Process.



In the competitive institutional marketplace, accurate, consistent, and timely data reporting is crucial to firms seeking to grow their AUM. However, for a boutique firm with limited resources and expertise, maintaining high completion rates across multiple databases was a significant challenge.

THE CHALLENGE

This boutique firm faced a daunting task: managing qualitative and quantitative information across 18 institutional databases due to limited staff and experience.

With an average completion rate of 50%, the firm recognized the need for professional support to improve their reporting capabilities to bring greater visibility to the firm and increase access to investor search opportunities.

They turned to IMSS for their decades-long expertise in database management and their proven track record in driving results.

THE APPROACH

IMSS conducted a comprehensive review of the firm's current databases. This in-depth analysis identified key deficiencies including critical fundamental data fields that were blank for the most recent quarter that are key to screening into search activity. Gaps in historical information going back to inception, and missing or outdated qualitative information and documents.

Our team worked closely with the client to understand their unique requirements, challenges, and clearly map out our end goals.

\$300M

ASSETS UNDER MANAGEMENT

18

DATABASES MANAGED

5

EMPLOYEES

50%

AVERAGE PROFILE COMPLETION

THE SOLUTION

Our team made several suggestions instrumental for our client to streamline and enhance the overall reporting process:

- **Implement a structured internal data flow process** to reduce time allocated to various firm individuals
- **Establish a single point of contact** responsible for collecting and reporting all information to IMSS to streamline the often complex and time-consuming data reporting process
- **Centralize data collection and submission** to reduce the stress on internal time and resources and allow them to focus on other important core business activities
- **Gain additional exposure to databases** to enhance the firm's visibility and open them up to new opportunities for growth

THE RESULT

50% —→ **90%**

AVERAGE PROFILE COMPLETION

The collective efforts of the IMSS team and our client yielded outstanding results.

Utilizing our custom, highly intuitive templates built to meet each database structure's reporting requirements, while implementing our meticulous process of database reviews and recommendations, the **completion rates went from 50% to over 90% across all databases.**

This remarkable improvement demonstrated the firm's commitment to a critical function imperative to investment firms seeking to gain access to investor search opportunities and grow AUM.

For a boutique firm facing data management challenges, partnering with IMSS proved to be a game-changer.

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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