DATA-CENTRIX®
Powered by **IMSS**

Streamlining Internal Processes for Clean Data Output

Achieving accurate, consistent, and complete data starts with a solid foundation—your internal processes. When your data aggregation and reporting systems are optimized, the result is cleaner data, greater profile completion rates, and more opportunities to increase assets under management (AUM) by building stronger consultant database profiles.

THE CHALLENGE

Many of our clients face difficulties with data standardization across various platforms. Without uniform processes in place, inconsistencies at the input stage often lead to inaccuracies, gaps, and incomplete data when reporting to consultant databases. These issues prevent firms from building comprehensive profiles that attract potential investors and limit their ability to effectively showcase their strategies.

Our client needed a streamlined approach that included both the refinement of internal data management practices and a robust technology solution to ensure a steady flow of accurate, comprehensive data into consultant databases.

THE APPROACH

We started with a detailed data audit, reviewing consultant databases the client was reporting to, and identifying gaps and discrepancies in both current and historical submissions. Then, we guided the client through a data cleansing and standardization process, focusing on eliminating inconsistencies and ensuring uniformity.

Leveraging our Data-Centrix automation technology, we streamlined bulk data uploads and generated consistent reports, efficiently updating historical data to correct inaccuracies. Finally, we worked with our client to refine their data management processes, implementing proactive checks and balances to maintain data integrity. This two-fold approach ensures cleaner, more accurate data for robust and reliable database reporting.

Our Average Clients

$150MM - $30B
ASSETS UNDER MANAGEMENT

15-20
DATABASES MANAGED

3 - 85
EMPLOYEES

2 - 30
STRATEGIES

THE SOLUTION

We provided our client with a comprehensive strategy to sustain high-quality data management over the long term. Our recommendations focused on empowering them to take control of their internal processes:

- **Dedicated Point Person:** Assign a single point of contact responsible for overseeing data quality and process optimization.

- **Data Transformation:** Implement standardized formats and structures to ensure consistency and compatibility across all platforms.

- **Data Validation:** Introduce rigorous data validation protocols to check for accuracy, completeness, and consistency at every stage of input.

- **Data Cleaning:** Regularly perform data cleaning to eliminate errors, remove duplicates, and ensure data integrity.

- **Quality Assurance:** Conduct ongoing audits and quality checks to quickly identify and address any issues that arise.

THE RESULT

Our collaborative approach with the client led to impressive results, including backfilling historical data to ensure comprehensive profile coverage, refining narrative responses, and updating legal documents to align with the highest industry standards.

By optimizing internal processes and leveraging automation, we helped our client achieve profile completion rates of 90-100%.

These improvements not only made it easier for our client to meet the evolving demands of consultant databases but also positioned them for greater AUM growth by increasing their visibility and credibility within the industry.

With our support, the client now experiences seamless data reporting with minimal effort, freeing them to focus on scaling their investment strategies and achieving their business goals.

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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