



Challenge

- Create a global equity technology roadmap and business case for presentation to Executive Management for a large independent global investment management provider
- Define a single instance installation and unified data model for decision support, trading and compliance across all global business units

Solution

- Provided industry expertise to successfully implement a platform encompassing portfolio management, trading and compliance for all business units across multiple trading desks
- Established the implementation team that gathered requirements, created processes and configured the application to enable seamless single stream data flow
- Functioned as PMO manager - coordinated all business analysis activity from planning through “go-live” phase

Results

- Fully implemented process and technology platform for global equity management and processing
- The platform facilitated a well controlled data environment, automated modeling of trades, automated post-trade compliance monitoring, consistent management reporting and measurably lower technology and operational costs
- Effectively realized a single-instance product installation to support all global business units

Challenge

- Separate front-office systems and processes for a business unit that provides investment products and solutions to institutional clients for one of the world's largest providers of financial services
- Integrate new investment management system with existing middle-office platform

Solution

- Provide industry and product expertise with project definition, development and implementation of front office applications
- Formed and managed project team tasked with project management, subject matter expertise and technical configuration assistance
- Led transfer efforts which enabled the introduction of additional funds by resolving data requirements and developing a flexible process flow

Results

- Successfully met the targeted "go-live" date and migrated the initial and subsequent lists of funds in an effective and controlled process
- Led critical initiatives that enabled 24-hour round-the-clock trading, which included derivatives trading (options and total return swaps), future product support
- Achieved all business objectives within project timelines and budget constraints

