

Overview

We helped one of the oldest media-focused private equity managers in the world migrate to SunGard's Investran platform for their \$42 billion in transactions dating back to 1989. Our team contributed to the successful implementation by understanding all the client's historical data and configuration needs and translating them to the vendor so that they could properly configure the system and accurately migrate the data. Our experience helped make the daunting task of implementing such a complex system go smoothly.

Client Challenge

- Manual recordkeeping using Excel required significant effort to ensure data integrity and accuracy
- Compliance team was requesting better operating control
- Manual reporting using Excel had limited capability and flexibility
- CRM data bifurcated between the front office and back office teams, maintained on multiple systems, Excel, OneNote, and email

SteelBridge Impact

- Developed a detailed workplan along with documenting the business requirements
- Completed a firm-wide CRM data cleanup
- Confirmed the system implementation approach, then assisted with the implementation and configuration
- Performed data migration using data load templates and manual entry
- Encouraged client to contribute dedicated resources to the effort in order to adhere to agreed upon timelines

Project Approach

Process

- Used various methods to discover, model, improve, and optimize business processes to align with the business requirements

Technology

- Determined the best use and configuration of the system to align with and improve upon processes, related to the business requirements

People

- Ran weekly team status meetings in addition to information gathering and decision making meetings
- Trained client team members on the collaboration using the new system

Design

- Created the idea of a "master investor" and utilized the system to implement the process based on the investor relationships in the CRM and Accounting modules

Management

- Led the project based on the detailed project workplan

Contact Us

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