

Overview

A top 10 global private equity fund manager needed industry expertise and project management support with implementing SunGard's Investran for their general partnership accounting needs. SteelBridge successfully managed the Investran implementation for 20 fund families, in 5 offices around the globe, and advised the client's Fin and Ops team, Steering Committee, and Senior Management.

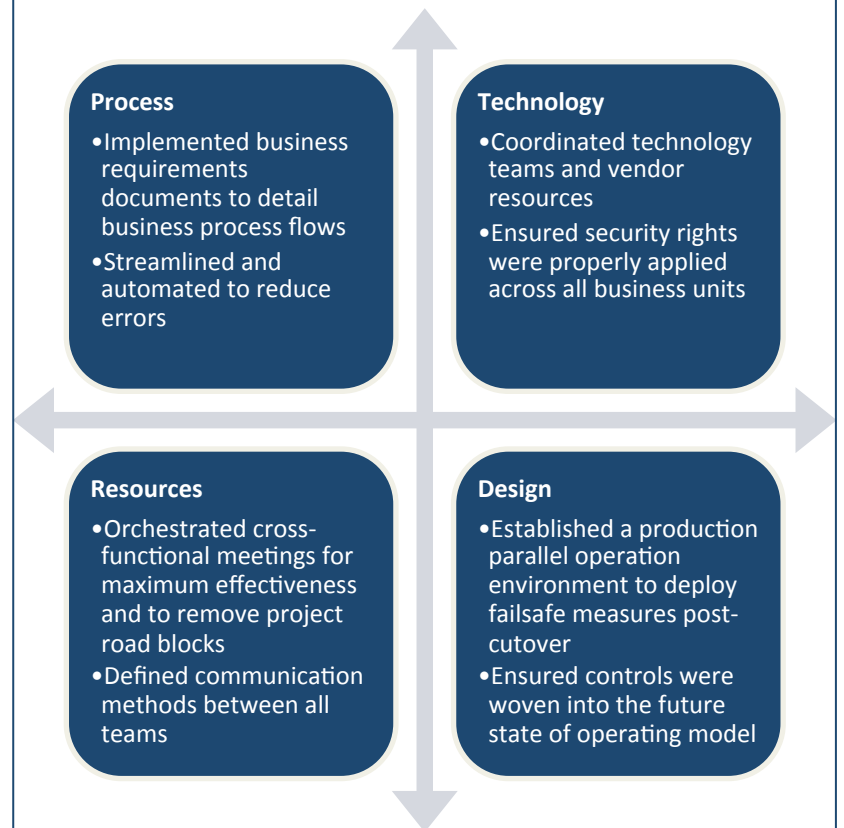
Client Challenge

- Legacy accounting software could not be relied upon to generate accurate books and records
- Careful orchestration was required to enable global accounting teams to perform day-to-day tasks
- No documentation for accounting process flows
- No maker/checker rules in place to ensure accurate data entry
- Reporting requirements and timetables were unclear

SteelBridge Impact

- Provided guidance on overall project strategy and industry standards, led and managed all project management deliverables, and managed vendor relationship
- Designed project management artifacts such as migration scorecards, timelines with milestones, status, and resource responsibilities documents
- Designed and executed approach for data migration and testing from source to target systems
- Improved the ability to produce more timely and accurate boardroom quality reports
- Documented all future-state processes needed to support business activities

Project Approach



Contact Us

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