

SUCCESS STORY

Data & Systems Migration

A financial services firm was seeking to become efficient with their data, systems, and reporting capabilities across the firm's multiple accounting and client service teams. SteelBridge effectively led a strategy assessment project providing understanding of existing data flow and manipulation that helped drive a technology decision.



Challenge:

To utilize their Fund Administrator's financial statements to enter, maintain, and create usable reporting. The ability to understand the new system and migration of data to regain control of the firm's data and reporting.

Approach:

SteelBridge worked with key stakeholders to review the inventory of fund data and reporting needs to identify the optimal future state.

Solution:

- Documented future state reporting needs
- Recommended reporting system and source data systems based on personalized process mapping.

RESULTS

SteelBridge successfully executed the data migration and configured necessary reports to meet the client needs. This solution allowed executive management to easily view the complex structures of systems and people working with the data inside the firm.