

CLIENT REPORT AUTOMATION

Measuring the ROI

Quality, accuracy and timeliness of client reporting are some of the ways an asset manager can distinguish itself from the competition. Unfortunately, client reporting is typically labor-intensive and often yields results that do not always reflect the level of effort put into producing monthly and quarterly statements.

A report automation solution, especially one that provides fully integrated e-delivery, can save time and reduce the stress of the typical reporting cycle. It will also make it easier for your investor relations team to deliver individually customized report packages. In an environment of rapid innovation where investors expect near real time information, clinging to manual client reporting is not merely costly, it can also send the wrong message to clients. It is a mistake to assume your investors still want you to mail reports. Most need a nudge. Below you will see some of the ways in which automating client reporting can deliver substantial benefits and significant ROI to your firm.

Where does your report automation ROI come from?

WHERE TO LOOK

THE CHALLENGES

WITH CLIENT REPORT AUTOMATION...



PROCESSING MANPOWER

Nearly half of all managers take more than two weeks after the end of the reporting period to prepare and deliver reports - clients want T+2 report delivery.

Report automation will reduce the time spent reporting by up to 75% and allow your team to get back to doing more client facing and revenue generating activities.



CUSTOM REPORTING

65% of managers customize less than 40% of their reports for clients. With 76% of investors planning to increase their custom reporting requests from managers, the need for a scalable solution is growing.

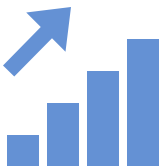
Create an easily repeatable process that will ensure all of your clients get the customized reports they want without costing you countless hours of modifications each period.



REPORT VALIDATION PROCESS

The process for reviewing reports is intensely manual.

Client Report Automation with workflow reduces validation time and ensures no client report falls through the cracks.



SCALABILITY

As you grow, the cost of producing client reports grows in a linear mode.

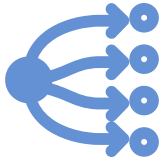
With an automated solution for reporting, the cost of onboarding and servicing new clients can be greatly reduced



DELIVERY OF REPORTS

Collating and mailing reports or sending them via email is time consuming and highly inefficient (and for email, it is also not particularly secure.)

An Investor portal eliminates the compliance and security issues surrounding email. It provides you an audit log of downloads and uploads, and share documents securely. It also allows your clients to manage contact details.



REPORTING TO 3RD PARTIES

Consultants, accountants, or other interested 3rd parties want consolidated reporting. Are you sending them a separate package for each client you share? How much of the reporting process could be reduced if separate packages were combined into a single report containing all client records?

By utilizing a report automation solution to consolidate your reports, you can collage and organize all reporting to 3rd parties.



CLIENT SATISFACTION & RETENTION

Performance is variable, but service is not.

Automation means you can deliver more comprehensive and customized reports to more clients, more quickly. Clients get the service they expect.



TIME SAVED LOCATING REPORTS

How much time gets wasted pulling up current or past reports?

A central document repository linked to contacts, accounts, and client entities makes it easy to find what you need to service your clients.

Firms often wrestle with these challenges and find individual solutions for each one to ensure that their clients get the reporting they want. Taking a holistic approach will yield far better results for both your firm and your clients. With so many firms vying for the same investor funds, finding any way to stand out in the market, while improving a business process and showing long term savings seems like a no brainer.

ABOUT SATUIT TECHNOLOGIES

Acquired by Tier1 Financial Solutions in 2021, Satuit Technologies is the premier provider of CRM, reporting, and portal software solutions for Buy-Side asset management, hedge fund, wealth management, private equity, and real estate markets. The company has offices in Canada, the United States, and the United Kingdom and serves clients in more than thirty-five countries. For additional information, visit www.tier1fin.com/satuit. For more information contact us at sales@satuit.com
