

Case Study

COST REDUCTIONS AND PROCESS IMPROVEMENT FOR VALUE EQUITY MANAGEMENT FIRM

Company Background

The client is a US-based asset management firm specializing in providing fundamental, value-oriented investment management strategies to clients. They use bottom-up research to identify high-quality undervalued companies with identifiable catalysts that can unlock future value.

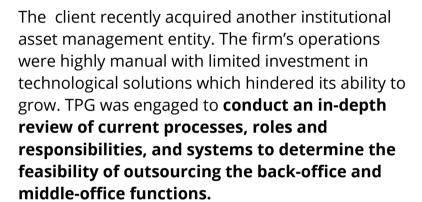
Benefits

\$2M+

net annualized savings identified

- **75% reduction** in operations team headcount
- Selection of outsourced provider to reduce operating costs by 40%

PROBLEM



APPROACH



- Process Mapping Mapped processes against each stream of business and identified weaknesses, pain points and solutions to make the org less riskoriented and prone to single points of failure and more robust and growth-ready
- **Business Impact Analysis** Proposed outsourcer vetted for operations, compliance and accounting
- HR Organizational Assessment and Realignment- Assessed individuals' ability to embrace change and support future growth with interviews; identified critical job functions to remain in-house compared to tactical tasks that could be outsourced



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