



Building Your Business Efficiently

Description

This research will identify practical methods for improving operating efficiency and scalability based on current practices and successful business models among investment managers. We will specify key indicators for measuring and optimizing your capabilities to support growth and new business initiatives.

The weight of the global financial crisis and economic downturn of the past few years forced investment firms to operate under tight budget constraints and reduced resources, while continuing to run business as usual. Firms focused their efforts on containing or reducing costs while maintaining service levels and mitigating risk.

As the markets slowly recover and investor confidence cautiously improves, investment managers are redirecting efforts to building the business with expansion into new geographic markets and the launch of new investment products. Narrow margins and a highly competitive landscape require the highest levels of efficiency and flexibility to promote growth and maintain profitability. Firms with a clear perspective on balancing operating costs to support current and projected revenue targets will be best positioned for the future.

Scope

This research will focus on the following areas:

- Define efficiency based on goals: headcount vs. value received; satisfaction vs. cost
- Identify appropriate metrics for measuring operational capabilities and satisfaction levels
- Examine approaches for allocating costs and compartmentalizing functions to increase flexibility for sourcing
- Review considerations for insourcing vs. outsourcing
- Identify criteria for determining sourcing requirements that best support your business model
- Define methodologies for leveraging current capabilities and platforms for supporting new products and new markets
- Examine formal business management strategies and methodologies developed by other industries, such as Six Sigma and Lean, to identify areas of applicability to investment management

Excluded from this research:

- We will not provide a detailed review of any technology platforms or solution providers
- We will not include a review of any sales and marketing strategies

Deliverables

A detailed Investit research report that will include current trends and leading practices for improving efficiency and positioning your firm for growth

Target Audience

- Senior business staff responsible for operating budgets
- Senior Operations and IT staff
- Firms interested in deepening their knowledge on this topic and exchanging ideas with industry peers

Related Research

Other Intelligence reports on efficiency include:

- Cost Modeling and Product Profitability (2011)
- Defining Operations Best Practice (2008)
- Managing an Investment Management Firm (2007)
- Using Key Performance Indicators (2005)

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Research to Power Your Success.

Research Topics 2012

Leveraging Technology to Enhance the Client Experience

Recently Published

This research will explore how investment managers are currently leveraging new technologies to enhance their client servicing. We will evaluate key opportunities, liabilities and challenges of current strategies, and identify leading practices that are adding the most value.

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Presentation: March 2012

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Data Management: The Journey Continues

Presentation: March 2012

This research will focus on the current state of data management among investment managers and third party administrators, and will identify how firms need to prepare for the future impact of new technologies, increased demands, and the exponential growth in data volumes.

Intelligence Back Catalogue

Topics Include:

Client

Enriching the Client Experience
Clients and Distribution
Transparency
Client Reporting Best Practice
Client Management

Industry Focus

Change within Investment Management
Managing an Investment Mgmt Firm

Investment

New Product Development
Funds Pooling
Liability-Driven Investments
Research Reshaped

Operations and Systems

The Future FX
Cost Modeling and Product Profitability
OTC Derivatives: Update
Global Distribution Models
UCITS IV
Fair Value Pricing
Defining Operations Best Practice
Changing World of the Buy-Side Dealer
Corporate Actions
Data Management
Collateral Management
The Future of Back Office Systems
Supporting Derivatives
Using KPIs
Corporate Data Projects

Outsourcing

Global Outsourcing Models
Outsourcing Data Management
Developments in the Outsourcing Model
Asset Servicing
Outsourcing Performance Measurement

Performance and Risk

Enterprise Risk Management
Managing Counterparty Risk
Operational Risk and Compliance
Performance Attribution

Current Intelligence Members

- Aberdeen Asset Management
- Aviva Investors
- AXA Investment Managers
- Baring Asset Management
- Baillie Gifford & Co.
- Henderson Global Investors
- Hermes Investment Managers
- HSBC Global Asset Mgmt
- HSBC Securities Services
- JP Morgan Asset Management
- JP Morgan Worldwide Securities Services
- M&G Investment Management
- Newton Investment Mgmt
- Northern Trust Company
- Northern Trust Global Investors
- Old Mutual Asset Managers
- RBC Dexia Investor Services
- Standard Life Investments
- State Street
- Threadneedle Investments

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