

## Case study

Achieved 50% time savings in monthly LP reporting for a large global private asset manager

### Background



- The client's investor relations team was responsible for producing high-quality Limited Partner (LP) reports, including performance reports, fund memoranda, and ad-hoc investor requests. However, the team faced challenges in meeting tight deadlines, managing multiple data sources, and ensuring data accuracy. The concentration of reporting around the same period, combined with bandwidth constraints, hindered their ability to deliver reports efficiently.

### Crisil Integral IQ solution



We implemented a comprehensive solution to address the client's challenges:

- Took full ownership of data collection (both quantitative and qualitative), sourcing, validation, and metrics calculations, which ensured accuracy and completeness
- Calculated fund performance and risk statistics, and compared the fund's performance against relevant benchmarks
- Actively supported drafting the LP fund memo, including investment objective and strategy, legal structure, fund specifics, distribution strategy, fee structure, management team background, and risks and returns ensuring high-quality output
- Automated data collection, validation, and reporting processes to reduce manual errors and increase efficiency
- Streamlined the LP reporting workflow, eliminating unnecessary steps and ensuring seamless data flow

### Client impact



- By leveraging automation and streamlining existing processes, the client was able to enhance their delivery excellence, improve productivity, and focus on high-value tasks.
- Realized 50% time savings in monthly LP reporting workflow through process streamlining and automation
- Enabled the reporting team to focus on strategic initiatives, improving their overall productivity and competitiveness.
- Improved the overall quality of LP reports, through enhanced data accuracy and completeness

### **About Crisil Integral IQ (formerly Global Research & Risk Solutions)**

Crisil Integral IQ delivers solutions and actionable intelligence to top financial institutions, driving strategic transformation, risk optimization, and operational excellence. Our offerings across research, risk, lending, analytics and operations have empowered clients to navigate complex markets, mitigate risks and unlock new opportunities. Our domain expertise, innovative solutions, future-ready technologies such as AI and data science give clients the confidence to accelerate growth and achieve sustainable competitive advantage. Our globally diverse workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East.

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Founded in 1987 as India's first credit rating agency, our expertise today extends across businesses: Crisil Ratings, Crisil Intelligence, Crisil Coalition Greenwich and Crisil Integral IQ.

Our globally diverse workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East, setting the standards by which industries are measured.

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