

Sales and distribution offerings

Our value proposition



Deep domain expertise

Across asset classes, risk, compliance and operations



Consultative partnership

Customized solutions driving operational excellence



Scalability

Enabling shorter time to market



Outcome-driven approach

Facilitating strategic decision making



Effective governance

Led by strong oversight and controls

How clients benefit from working with us

Unlock transformative value via our consultative approach facilitating strategic decision making



Facilitate client acquisition and drive higher win rate



Support marketing and brand-building activities



Lower cost of ownership by effective transformation of workflows

About us



A company of
S&P Global



25 years
collaborating with
asset managers



**100+ asset
managers**
partnered with



**12 global
delivery centers**

Our solutions



Digital marketing

- Web/social media analytics
- Content publishing support
- Marketing collateral development



Customer/ channel analytics

- Channel analytics
- Analytics to facilitate client prospecting
- Drive client engagement



Thought leadership

- Support on thought leadership articles
- Product positioning studies/intelligence
- Editorial support



Client prospecting

- Evaluate and respond to RFP/ DDQ requests
- Content library and collateral management
- Client reporting

Gen-AI accelerator streamlining RFP/DDQ workflows

Features



Domain driven AI-Pod architecture for RFP response generation



Knowledge based integration(across CRM, document repository etc.)



Workflow automation (RFP analysis, interview with SMEs, compliance checks, proposal review etc.) with curated dashboards

Benefits



Maximize RFP participation with missed -opportunity prevention



Curated responses driving higher win rates



Auditable and compliance-ready fact verification

Snapshot of our strategic partnerships

	Custom content creation for HNI clients	Support in RFPs/ RFIs and DDQ requests	Marketing material customization	Building thought leadership library
Solution	Tailored pitch decks and asset allocation commentaries for client meetings	Automation led transformation for RFP/ DDQ with streamlined data management	Marketing content creation with editorial support for investor meetings and education	Developed PoVs, white papers, blogs, etc., in collaboration with the onshore partner
Impact	High quality content with 40% TAT reduction	Efficiency gains of 20-30%	Be-spoke content enhancing client engagement	Positioned client as a market leader



Thomas Butler
Global Client Partner
+1 917 865-3530
thomas.butler@Crisil.com



George Goldman
Global Client Partner
+1 917 670-9554
george.goldman@Crisil.com



Sam Elbarouki
Global Client Partner
+1 831 521 -3585
sam.elbarouki@Crisil.com



Akshat Ruia
Global Head of Buyside
+91 961 959-1592
akshat.ruia@Crisil.com



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Argentina | Australia | China | Colombia | Hong Kong | India | Japan | Poland | Singapore | Switzerland | UAE | UK | USA
Crisil Limited: Lightbridge IT Park, Saki Vihar Road, Andheri East, Mumbai 400 072, India
Phone: +91 22 6137 3000 | www.integraliq.Crisil.com

[/company/Crisil](https://www.linkedin.com/company/Crisil) [@CrisilLimited](https://twitter.com/CrisilLimited) [/CrisilLimited](https://www.facebook.com/CrisilLimited) [/user/CrisilLimited](https://www.youtube.com/user/CrisilLimited) [@lifeatCrisil](https://www.instagram.com/lifeatCrisil)

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