

Case study

30% faster client reporting with end-to-end workflow ownership

About the client



A mid-sized European asset manager looking to improve transparency through advanced client reporting.

Client challenges



- Managing extensive reporting commitments, including performance reporting, performance attribution and adhoc investor requests
- Reporting bottlenecks due to concentrated deliverables in mid-month cycles, straining resources and turnaround times

Our solution



Crisil team:

- Took complete ownership of key reporting workflows to streamline and automate end-to-end reporting processes
- Distributed workflow load by systematizing tasks and creating a structured calendar for reporting cycles
- Collected validated data (quantitative and qualitative) from multiple sources, reconciling discrepancies for accuracy
- Calculated fund performance and risk statistics, benchmarked results against relevant indices
- Drafted reports and investor memos including investment strategy, fund structure, distribution, fees and risk-return insights
- Incorporated multi-stakeholder feedback through a centralized review and approval process

Impact and results



100%

Ownership of end-to-end reporting workflows, enabling process automation and standardization

30%

Faster turnaround through streamlined data validation, performance calculation, and memo drafting

Seamless

Transition with no data gaps or missed deadlines

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