

## CASE STUDY

# Automated Quarterly Fund Reporting

How we helped a leading global asset manager's private equity division cut a **3-week manual process to 1-hour** and **save \$104k annually**.



### BEFORE: MANUAL & FRAGMENTED

**Three weeks** of manual effort from multiple associates each quarter.

**High risk** for errors and inconsistencies from manual data handling and transfers.

**Disjointed process** across Excel, PowerPoint, and InDesign with no standardization.



### AFTER: AUTOMATED & SCALABLE

Reports produced in 1 hour a **98% reduction** in production time.

Data consistency and accuracy ensured across **all 23 funds**.

A scalable framework that **grows with the business**.

## HOW WE DID IT

01

### Data Foundation

Structured data with custom loaders and unique identifiers for accurate reporting.

02

### Business Rules Engine

Configured automated rules for calculations, visibility, and fund variations.

03

### Intelligent Templates

Built dynamic templates that adapt to data while preserving brand integrity.

04

### Cross-Functional Collaboration

Aligned sales, marketing, operations, and data teams around a scalable workflow.

05

### Scalable Automation

Streamlined reporting from raw data to final publication-ready output.

## RESULTS

**98%**

**Faster Production**

Reduced quarterly reporting time from 3 weeks to 1 hour.

**23**

**Funds Automated**

A scalable framework designed to support future growth.

**\$104K**

**Annual Savings**

Eliminated weeks of manual production work and reduced operational overhead.



Operationalizing data, workflows, and collaboration enabled a more strategic reallocation of resources, unlocked scalable growth, and improved outcomes.



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