



## Case Study

### A Leading Global Investment Management Firm

An industry-leading **Asset Management Company**, offering a wide range of investment management services, designing and implementing sophisticated investment strategies for institutions, consultants and advisors. This company maximizes global and local investment strategies through an inter-connected network of 28 offices and nine Global Investment Centres.

#### The Business Issue

The company provides a bureau-based administration and management function on behalf of a series of Investment Management Brokerages concerning the daily financial activities of their high net worth investors. With a significant part of the administration function being related to physical information delivery to customers.

When the need arose to provide these services to brokerages across multi-national borders, they needed an international partner capable of providing an automated work-flow so that back-office image and document production could be seamlessly integrated with globally remote print and distribution partners. Quality of Service and control was paramount.

#### The Solution

DTP's Jupiter™ application provided the precise solution desired. We integrated with the client's back-office processes which automatically transfers daily and periodic based image data feeds for distribution globally according to each documents final destination.

Full control and review processing has been implemented catering for multi time-zone schedules, on-line document approval, print, reprint and postal dispatch are all encompassed with full monitoring under an easy to use web interface.

Additional value adds provided by the Jupiter solution include full application context management information reporting, flexible archiving and on-line storage.

By adopting a DTP solution, this client has seen considerable reductions in cost of production, distribution, and the overall process with automated management reporting and high levels of control.