

A Private Equity Firm Scales Global Technology Adoption

The Client

Global private equity firm with \$15 billion+ in assets under management (AUM)

Users

Investment, Finance, Investor Relations, Technology, Operations team

Technology adoption to streamline portfolio management and reporting is no longer a differentiator for asset managers, it's a requirement. Deal, investor relations, and portfolio management teams now expect every datapoint at their fingertips to enhance their due diligence, investor reporting, and valuation workflows.

However, many asset managers fail to recognize the continuous post-implementation investment necessary to keep their technology stack aligned with evolving business needs. As firms grow in assets under management (AUM), it is equally as important to evolve their investment strategy as it is to adapt their technology, systems, and processes.

The consequences of failing to evolve technology platforms are severe — the key is minimizing the gap between a firm and its technology stack to continuously add value.

The operations team at this global private equity firm faced the consequences of a widening technology gap. Over time, their iLEVEL configuration became misaligned with key business requirements across the front and middle office. To minimize the technology gap, the operations team partnered with **iLEVEL Expert Services** to drive global platform adoption, manage “data creep,” and enhance platform workflows to meet business requirements.



Key Challenges

Members of the operations team were challenged to adapt their existing iLEVEL portfolio management solution to meet the following functional requirements:

- Shifting focus from data collection to actionable reporting and insights for the investment team
- Equipping investor relations teams with advanced analytics and automated reports to streamline ad-hoc and recurring investor reporting requirements
- Managing “data creep,” or the desire to capture more financial and operational data from private assets to satisfy the demands of internal teams
- Leveraging technology to enhance cross-functional relationships across the firm

While also delivering on the following business requirements:

- Maintain business as usual (BAU) operations
- Drive global platform adoption across the front, middle, and back office
- Demonstrate the value add of iLEVEL to senior leadership for continuous investment and to enable scale without adding headcount
- Create impetus for change to established processes at a firm with a long history of investment success

The Approach

- Identify key outputs—not inputs—needed by the C- Suite and investment team, then align iLEVEL platform accordingly
- Adopt a technology centered approach to minimize human Intervention, freeing up bandwidth to facilitate analysis, and generating quick wins
- Use a "crawl, walk, run" approach of breaking work into smaller, more manageable projects to generate momentum

“The key was transforming IT from a business unit that fixes problems to one that is a business partner. Platforms must evolve with the business, just as an employee would, or there becomes a gap.”

Data and Systems Manager

The Solution

With unparalleled expertise that connects clients to the power of private markets, **iLEVEL Expert Services** helps investors achieve the 'art of the possible' by driving innovation and excellence in their operating models.



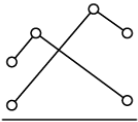
Resource Management

Scale your operations without adding staff. Gain flexibility in managing ongoing operations, advancing key strategic projects, and more.



Access to Expertise

Access specialized technology expertise from an experienced provider with insight into best practices used across the industry.



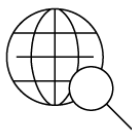
Strategic Planning

Advance strategic planning capabilities with capacity-building platform optimization sessions, designed to help streamline processes and increase technology adoption across the firm.



Operational Resiliency

Build continuity in your operations with well-documented, professional management of your technology platforms. Avoid key individual risk with built-in third-party resiliency.



Global Implementation

Implement the latest best practices and keep your solution updated globally through structured reviews with our team.



Sustainability Tracking & Reporting

Manage, validate, and streamline environmental, social, and governance data related to your investment portfolio. Our team helps define your sustainability strategy and oversees the implementation metric tracking on an ongoing basis.

Key Benefits

Members of the operations team leaned on **iLEVEL Expert Services** to minimize the technology gap across the business and achieve efficiencies through global adoption of iLEVEL. In particular, they saw great value in being able to:

- Multiply their efforts to achieve 100% iLEVEL platform adoption across the front, middle, and back-office
- Develop their instance of iLEVEL in alignment with their rapidly growing and changing business needs
- Clearly demonstrate the return on investment of portfolio management technology to achieve buy-in from senior management
- Extend the reach of their team to optimize platform utilization while maintaining business as usual operations

iLEVEL Expert Services for Private Markets

S&P Global Market Intelligence is committed to working with private market fund managers and investors to help them achieve greater strategic value through technology.

Advisory and Expert Services helps investors manage resources, access the best industry expertise, and build strategies that leverage technology solutions to meet core goals and objectives. This continuous support model provides flexibility as client needs evolve.

Click [here](#) to learn more about iLEVEL, including Advisory and Expert Services.

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