

Generating Portfolio Value Through Technology

The Client

European private equity firm with
< £500M in assets under management
(AUM)

Users

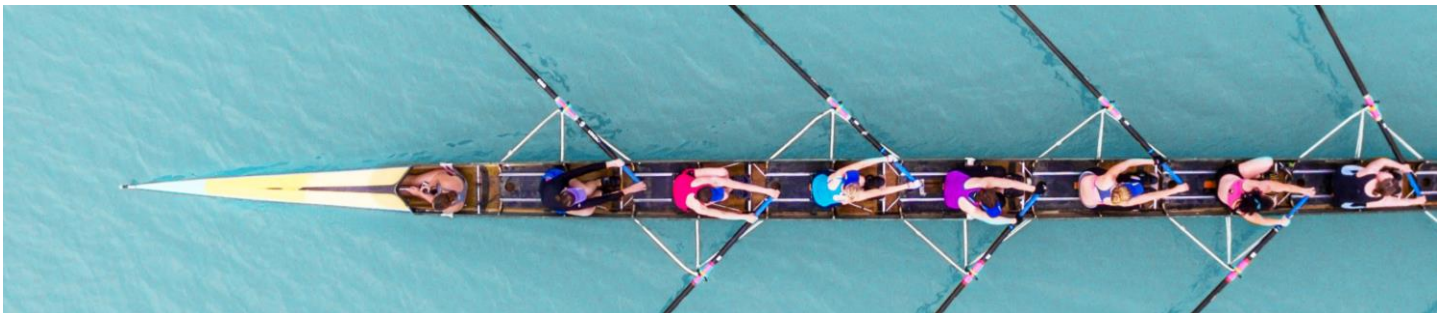
Investment, Business Development,
Technology, Portfolio Finance team

For asset managers, technology has evolved from being a mere internal tool to an indispensable driver of operational efficiencies across the front-to-back office. However, for those visionary firms that harness technology more creatively, it has become a potent source of competitive advantage.

Through an integrated approach to technology, many firms have enriched their process workflows from fundraise to exit, generating value for key stakeholders at each step of the investment lifecycle. By leveraging cutting-edge data and software, these innovators are making more informed investment decisions, gaining a deeper understanding of portfolio trends, and forecasting performance with unmatched precision.

In this fiercely competitive landscape, the strategic use of technology has the power to redefine success for asset managers, separating the frontrunners from the rest.

The portfolio finance team at this European private equity firm seized the opportunity to drive process change through technology. By expanding their use of iLEVEL, S&P Global Market Intelligence's portfolio management solution, from a central source of truth to a value creation engine, the team transformed an internal tool into an external competitive advantage. To design and execute this long-term portfolio management strategy, the team partnered with **iLEVEL Expert Services**. By leveraging iLEVEL Expert Services, as an extension of their team, this asset manager developed a technology strategy and process that maximized value for its portfolio.



Key Challenges

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

- Expanding the firm's iLEVEL use case from a central source of truth to a critical tool that scales portfolio value creation and streamlines data workflows.
- Designing a long-term strategy around portfolio management technology amidst turnover at the firm.
- Shifting focus from data collection to actionable reporting and insights for the investment team.
- Equipping portfolio companies and the internal investment team with analytics and automated reports to generate value.

At the same time, the firm needed to deliver on the following business requirements:

- Maintain business as usual (BAU) operations.
- Drive global platform adoption across the front-, middle-, and back-office.
- Transform technology into a competitive advantage rather than an internal tool.
- Generate return on investment (ROI) from technology investment through time savings, cost savings, etc.
- Differentiate between the current versus desired state of technology to demonstrate value.
- Facilitate collaboration between portfolio companies and the firm to align mutual interests.

The Approach

The firm adopted the following approach to overcome the challenges outlined above:

- Leverage iLEVEL Expert Services as a thought partner and extension of the portfolio finance team.
- Scale existing workflows by focusing on outputs - not inputs - that are critical to internal and external stakeholders.
- Institutionalize subject matter expertise by designing standard and sector specific outputs with relevant key performance indicators (KPIs) to execute real-time and forward-looking analysis for existing and future investments.
- Generate value for portfolio companies by implementing industry best practices and standardized output reports to use in their own reporting and analysis.
- Solidify the portfolio review process and strategy by leveraging iLEVEL as a single source of truth and collaborative tool between the firm and its portfolio companies.

“The ultimate goal with iLEVEL is to get it to a level where it helps act as a differentiator between us and our competitors when portfolio companies are choosing their next investment partner.”

Portfolio Finance Lead

The Solution

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



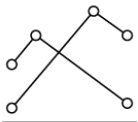
Resource Management

Scale operations without adding staff. Firms 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 their operations with well-documented, professional management of their technology platforms. Avoid key individual risk with built-in third-party resiliency.



Global Implementation

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



Sustainability Tracking & Reporting

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

Key Benefits

Members of the portfolio finance team leveraged **iLEVEL Expert Services** to generate value across their portfolio, gain a competitive advantage through technology, and achieve operational efficiencies through firm-wide adoption of iLEVEL. In particular, they saw great value in being able to:

- Multiply their efforts to achieve iLEVEL platform adoption across the front-, middle-, and back-office.
- Clearly demonstrate the return on investment and portfolio value creation achieved from their use of technology.
- Extend the reach of their team to optimize business as usual operations, design a long-term technology strategy, and a process to achieve it.
- Develop their instance of iLEVEL in alignment with their new long-term technology strategy and changing competitor landscape.

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 help 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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