



Overview

The need

Hedge fund administration company Quintillion wanted to keep its business on track for profitable growth without compromising on the high-quality, personalized service that its clients have come to expect.

The solution

Quintillion worked with IBM Business Partner Insight 2 Value to deploy a customized platform for managing end-to-end fund administration and client interaction, built on IBM® Case Manager software.

The benefit

Doubled portfolio of assets and investors while increasing staff numbers by just 30 percent. Fast content access and more efficient process management reduces staff workload and supports highly responsive service.

Quintillion

Doubles business volumes and enhances investor service while maintaining lean staffing levels

Quintillion is a hedge fund administration company based in Dublin, Ireland. An indirect, wholly owned subsidiary of U.S. Bancorp, Quintillion provides a variety of fund administration, back office support and shareholder services to clients ranging from large international corporations to boutique private firms.

Delivering an exceptional client experience

Quintillion prides itself on offering a highly responsive, hands-on approach to fund administration, serving each and every client with a dedicated team of specialists. For these teams, the key to delivering superior end-to-end service is ensuring that all client queries are resolved swiftly and expertly.

Charles Gillanders, CTO of Quintillion, elaborates: “For each of our funds there is a large volume of related documentation that needs to be processed and accessed on an ongoing basis, such as emails, application forms, financial statements and more. Our teams need instant access to this content in order to serve clients effectively—they can’t afford to waste time sifting through our systems to locate a particular piece of information.

“Quintillion was founded because we saw an opportunity to do things differently, and we feel very strongly about only making technology investments that support this approach. IBM Case Manager fits perfectly into our unique business culture, and is helping us maintain a high-value, client-focused service as we continue to grow,” says Charles Gillanders, CTO, Quintillion.



Solution components

Software

- IBM® Case Manager

IBM Business Partner

- Insight 2 Value
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“As we grew the business and our fund portfolio, we wanted a way to manage the corresponding increase in documentation without taking on additional support workers. We also absolutely wanted to avoid burdening our existing specialist teams with low-level administrative work, as that would impact their ability to offer clients the high-quality, individualized service that they had come to expect from us.”

Finding the right fit

Seeking a way to better control fast-growing enterprise content, Quintillion worked together with Insight 2 Value, an IBM Business Partner, to design and deploy a platform for managing end-to-end fund administration and client interaction, built on IBM Case Manager.

Gillanders states: “We looked at a number of products and IBM Case Manager really stood out as the one solution with all the capabilities we needed from a fund administration point of view. We were confident that it would be a good fit for our ways of working, and would help us meet our goals.

“Insight 2 Value was absolutely critical to the success of this project—the team took a lot of time to learn about our business and requirements, and really tailored IBM Case Manager to make it a perfect fit for Quintillion. I don’t think we would have been as successful working on our own or with a different partner that did not have such expert knowledge of the Case Manager solution.”

Quintillion was equally impressed by the ease and speed of its Case Manager implementation, as Gillanders notes: “Deployment was a very quick, straightforward process. In all, it took us less than four months to fully roll out IBM Case Manager, and we were able to implement the solution with no disruption to the business.”

Centralized content management

Today, Quintillion uses Case Manager to provide a centralized repository for content in a variety of formats, including emails, scanned images, spreadsheets, PDFs and more. The solution allows staff to group related content together in a single electronic record, helping speed access to key information and ensuring that client queries are always handled effectively.

Will Callaghan, Senior Manager of Investor Services at Quintillion, comments: “With Case Manager we can link all documentation related to a specific account in one place, giving a full record of every interaction with a client. This means that if a client calls us with a question, we can look up the relevant information and give them an answer almost instantly, without even having to put them on hold or call them back.

“Since deploying IBM Case Manager we have roughly doubled the number of assets managed and investors supported while expanding our investor services team by just 30 percent.”

—Charles Gillanders, CTO, Quintillion

“IBM Case Manager absolutely makes life easier for our team. When there is someone on the other end of the phone who wants quick answers, it is of huge benefit to have a tool that allows us to find that information in just a few mouse clicks.”

Fast, flexible solution

In addition to accelerating information access, Quintillion also uses IBM Case Manager to create automated workflows that guide staff through the required process steps for each piece of documentation, with a sophisticated checklist feature offering at-a-glance views of the current status of each case. The solution’s flexible design makes it easy for business users to customize these workflows and checklists as needed.

“The solution offers a very intuitive, simplified user interface, and it is easy for staff to make changes,” says Callaghan. “For example, if we receive regulatory guidance that an additional check needs to be made against an application form, IBM Case Manager allows our users to add the new step to the checklist template and then roll that change out across the entire platform. Similarly, if we want to add a new type of case document we can do so very easily.

“There are so many key tasks—and such a high volume of them—that our team must handle day-to-day. If these steps aren’t completed quickly and efficiently it would have a very noticeable impact on our operations and client service. It was clear from day one that IBM Case Manager was very effective in helping us avoid any operational speed bumps and allowing us to maintain a high level of responsiveness to clients.”

Supporting profitable business growth

By streamlining access to key content and enabling investor services teams to work more quickly and efficiently, IBM Case Manager has helped Quintillion to meet its goal of increasing its client base and fund portfolio while maintaining lean staff levels and without compromising on the high-touch, high-value service delivered to investors.

Gillanders concludes: “Since deploying IBM Case Manager we have roughly doubled the number of assets managed and investors supported while expanding our investor services team by just 30 percent. The solution has played a critical role in helping us to grow the company and maintain a profitable ratio of staff to clients. With Case Manager, we feel very confident that we will be able to keep offering that high standard of communication and close attention that our clients demand as we continue to grow.”

About Insight 2 Value

Insight 2 Value provides enterprise content management, document management and business process management solutions to large and small organizations in the UK.

To learn more about products, services and solutions from Insight 2 Value, please visit www.insight2value.co.uk



For more information

To learn more about IBM Enterprise Content Management solutions, contact your IBM representative or IBM Business Partner, or visit the following website: ibm.com/software/ecm



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