

Unlock insights on any data

Customer Solution Case Study



Asset Manager Gains Greater Business Insight with New Business Intelligence System

Customer: Stenham Asset Management

Website:

www.stenhamassetmanagement.com

Customer Size: 35 employees

Country or Region: United Kingdom

Industry: Financial services

Partner: Northdoor

Website: www.northdoor.co.uk

Customer Profile

Stenham Asset Management provides market-leading investment solutions for clients that include pension funds, charities, family offices, and high-net-worth individuals. It has approximately US\$2 billion of assets under management.

Software and Services

- Microsoft Server Product Portfolio
 - Microsoft SQL Server 2012 Business Intelligence
- Microsoft SharePoint
 - Microsoft SharePoint Server 2010 Enterprise

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“Data is the lifeblood of our business. With our data hub built on Microsoft SQL Server 2012, information quickly flows throughout Stenham Asset Management, which helps us compete more effectively.”

Giulio Battaglia, COO, Stenham Asset Management

Investment management company Stenham Asset Management wanted to centralize data from multiple internal and external systems in order to drive faster, more informed decision making. The company created a data hub based on Microsoft SQL Server 2012 and is now able to integrate data and use Microsoft SharePoint Server 2010 to deliver timely information to senior management, clients, and partners while improving control, reporting, and investment decisions.

Business Needs

For more than 25 years, Stenham Asset Management has been helping its clients to preserve and grow wealth in a disciplined, risk-averse manner. Its multiple-award winning funds are regularly ranked highly for performance by independent analysts, and the company prides itself on its strategic approach and focus on client needs.

In the asset management sector, fast access to timely information is critical—data on market movements is vital to monitoring ongoing performance and making the correct investment choices. The market is changing rapidly, and increasing competition has led to pressure

to reduce the fees charged to clients. Organizations need to maximize their efficiency and work closely with external providers who can manage processing and back-office functions, allowing asset managers to focus on investment choices that deliver the highest returns.

Stenham Asset Management wanted to adopt a more cohesive and efficient approach to managing information. The company operated a mixture of internal and external business systems that had grown organically. In 2010, it switched to a new external administrator that used advanced monitoring and reporting systems to provide independent verification and valuation of the funds

managed by the company. Stenham Asset Management decided to take advantage of the move to review its current IT environment and make strategic changes.

"As customers and the environment we operate in become more demanding, we knew that we needed to improve our access to internal and external data and review how it was presented to both business users and clients," says Jon Shapiro, Head of IT at Stenham Asset Management. "We wanted to create a single platform that could bring together all the data flowing around the business, consolidate it, and make it available both inside the organization and via our web-based client portal."

Solution

To meet its goals of centralizing information and making it easier and faster to access data, Stenham Asset Management chose to work with Microsoft Partner Network member Northdoor, which had already worked with the company and had a strong understanding of its direction and the investment market.

Northdoor recommended Microsoft SQL Server 2012 Business Intelligence and Microsoft SharePoint Server 2010 Enterprise to build Stenham Asset Management's data hub and provide powerful reporting tools. Stenham Asset Management was impressed with the business intelligence capabilities, such as tabular modelling, that Microsoft SQL Server 2012 provided.

"We already used Microsoft SQL Server to provide analysis capabilities within internal systems, and the new functions made it a compelling choice," says Shapiro. "While it was relatively new technology, we saw the advantages that it offered, providing the platform for us to build a data hub that integrated multiple systems and automated reporting for the entire business, our external partners, and clients."

The project began in July 2012, and the first data reports were generated just three

months later. Data from external data providers, internal line-of-business software, and administrator systems now passes through the platform, where it is standardized before being delivered to clients via the web portal, internal staff through SharePoint Server, and senior management through daily, emailed reports and the intranet.

"The new system brings together our entire data universe and makes it easier for our users to interact with vital business information, without having to navigate through multiple interfaces," says Giulio Battaglia, COO at Stenham Asset Management. "It is helping us to make data available to all parts of the business in a timely manner."

Benefits

Since using Microsoft SQL Server 2012 to build its new data hub, Stenham Asset Management is benefitting from:

- **Increased business control.** In a complex trading environment, Stenham Asset Management now has a much more comprehensive view of partner operations and it can reconcile balances with its administrator on a daily, rather than monthly, basis to reduce administration time.
- **Greater investment transparency.** Because managers now receive updates every time relevant information changes, they can spot underperforming funds and take faster decisions about vital investment strategy, improving the investment process it offers to its clients.
- **Improved back-office and IT efficiency.** By automating previously manual tasks, the company has been able to reduce costs across its front and middle office divisions. The more centralized approach also increases IT efficiency, as data is housed in one place, helping disaster recovery and resiliency planning.

- **Competitive differentiation with clients.** "Our data hub has increased the depth and breadth of information that we can share with our clients, allowing us to demonstrate the end-to-end investment process by differentiating ourselves in the market," says Shapiro.

- **Improved reporting across the business.** Relevant, timely information is now available to all staff, which they can use to make faster, more informed decisions to drive the business forward. This reduces reliance on key individuals because information is shared throughout the company.

"Data is the lifeblood of our business. With our data hub built on Microsoft SQL Server 2012, information quickly flows throughout Stenham Asset Management, which helps us compete more effectively," says Battaglia. "It puts us at the forefront of the industry and is delivering real value to our overall business operations and strategy."