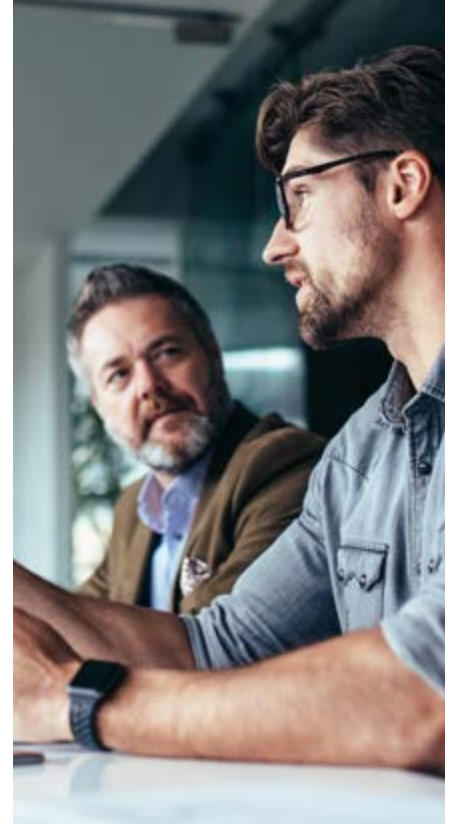




Reimagining Investment Operations with Users in Mind

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Technology is advancing at an accelerating pace, and asset managers using older operational infrastructure or piecemeal solutions are having a harder and harder time keeping up—if they're able to keep up at all. Firms that continue to work in operational siloes with a patchwork of legacy systems are in danger of falling behind and becoming unable to meet regulations and customer expectations. Investing in technology is the logical choice to advance a business, but how do you choose a solution that pays you back in cost savings and efficiency gains?



Today's investment operations have reached a point where most firms have optimized everything they can out of their current systems, and today, time is mostly spent on custom integrations and custom workflows to get the most information possible.

While past and present have mostly focused on the functions that technology can deliver—such as recon, performance, accounting, reporting, compliance, etc.— the future is focused on the user of the technology.

As it becomes easier and more expected that users can access information and data from a single source, the delivery has shifted so that these functions are available to whichever end user needs them. This helps create a significant reduction in time and specialization of roles and allows the system to perform tasks that once had to be done by people.

Where data used to be housed in multiple locations and data warehouses, today it can be accessed from a unified source providing real-time information to all users across all asset types and functions from front to middle to back office. This gives you the tools to evaluate, for example, your exposure in a certain foreign country or your exposure in natural gas.

This future state of operations allows users to access information quickly without having to rely on specialized function-specific systems. Being able to stream events into a single platform

allows for workflows that automatically update and integrate downstream services, which ensures data timeliness and accuracy.

Security measures are as important as ever as we move into the future of operations. With a dispersed workforce working on varying systems, security should be planned from the beginning, not afterward, with constant and diligent updates to fight off attacks. Moving forward, a layered defense approach is recommended, as well as aligning controls based on industry best practices such as ISO/ICE 27000 series.



Traditionally, users worked in dedicated operations roles. Many of these roles can now be automated, allowing end users to help themselves, allowing timely access to important information, reducing overhead and improving scale. This future self-service model will be further propelled by device independence, mobility, continuous operational improvement and the push towards automation of repeatable tasks.

The final key to the future of investment operations comes from a continuous and always-on model. With today's global investments, there is a shift away from start-of-day and overnight processing, and towards continuous exception-based operations. Operations can occur 24 hours a day in a stateless environment, allowing faster resolution of incidents, more timely response to data errors

and reporting efficiency. This has allowed for flexibility of work hours across the globe and a reduction of man hours by as much as 25%.

SS&C's newest investment operations platform, Aloha, was designed with the future of investment operations in mind. Aloha reimagines investment operations around a single data model, with advanced intelligent technologies creating an intuitive user experience that empowers users to focus on what is most important. For more information about centering investment operations around the user experience, [download our "Accelerate the Speed of Information" whitepaper](#) or [contact sales](#) for more information.