

Increasing Profile Completion Rates

We see managers struggle with updating databases due to time and resource constraints. Oftentimes they fall short of completing this critical task to the level necessary to screen into search activity.

THE CHALLENGE

The investment firm was struggling to improve their profile in what we deem the most critical database for several reasons and was showing a low completion rate of 17%.

Recognizing how significant this database is to search activity, the firm sought to outsource the project as an efficient way to solve the problem, gain more understanding of the overall database requirements, and position itself for more consistency with future updates.

THE APPROACH

Before the firm hired IMSS, it was challenged with limited resources, unfamiliarity with the database structure, and the extensive amount of work required to bring their profile completion rate above 90%.

IMSS conducted an in-depth review of the database and issued a report detailing all of the missing and/or inaccurate information and created a plan to rectify the issues across all sections of the database.

\$203M

ASSETS UNDER MANAGEMENT

2

STRATEGIES

5

EMPLOYEES

17%

AVERAGE PROFILE COMPLETION

THE SOLUTION

IMSS implemented a system to track all of the corrections/updates in each area of the database. As each task was completed the system was updated.

IMSS created a detailed next steps plan to rectify the issues across all sections of the database.

The services IMSS supplied included backfilling historical information to inception – portfolios, AUM, employees, fundamental data, additional characteristics, review of narratives and ensuring all legal documents, dates and other information were consistent and up to date.

THE RESULT

17% → 98%

AVERAGE PROFILE COMPLETION

IMSS successfully brought the client from a 17% completion rate to 98% across the entire database.

Given our 30+ years of knowledge and in-depth experience in database reporting and implementing our Data-Centrix technology, our team was able to expedite the entire process and increase the visibility for the firm and gain access investor search activity they would have otherwise not benefited from.

**You've got the data.
We have **the experience.****

IMSS simplifies data reporting by helping managers expedite the delivery of data to consultant databases globally.

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