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CONSULTING

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# Elgin White Front Office Review Service

Post-implementation analysis, best practice advice, and results-oriented refinements



## What a relief, implementation is over! What comes next?

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### Post-implementation reviews maximize return on investment & value to the business

When reflecting on your implementation with hindsight most Front Office project teams still find some questions difficult to answer:

- Did I get what I asked for?
- Is the value to the business clear and measurable?
- Am I getting the most out of the solution?

Whether your front office software solution was a stand-alone project or part of a broader roadmap, Elgin White's post-implementation Front Office Review Service ensures you leave no value on the table and reap the rewards of such a significant investment.

Elgin White's consultants have deployed numerous front office solutions over several decades. Unlike your internal team they are not emotionally invested in the deployment and are able to assess the performance of your new solution objectively.

**Our structured approach to evaluating your current state and setting next steps helps to refine your new solution, maximize return on investment and apply best practice across your front office.**

We help you to prioritize follow-on tasks and create compelling business cases for improving your solution.



## Flaws that can linger post-implementation

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Even when implementations are deemed successful, elements that often remain challenging post-implementation include:

- Portfolio ideation or construction still rely on Excel and take inputs from multiple sources
- Cash management is not trusted and still shadowed and handled outside the system
- Pre-trade compliance focuses on similarity in results and rules to previous systems and is not optimized for either functionality or speed
- The integration between Portfolio, Order and Execution Management Systems was simplified to the extent that information exchange is based on the minimum requirements
- Error handling workflows are not well enough defined
- STP rates could be further enhanced, cost defaults are incomplete and there is still more manual interaction and reconciliation needed than desired
- Dashboards are missing or incomplete

**These lingering flaws can impact your ability to optimize performance and satisfy the needs of the business. They also call into question the effectiveness of your deployment with key stakeholders across the business.**

# Additional enhancements to consider

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Some aspects that could be improved only become apparent once you start utilizing the system on a day-to-day basis.

Typical enhancements include:

- Additional data feeds and fields
- Integration of more third-party tools for portfolio ideation and construction
- Extending compliance coverage due to enhanced functionality
- More tightly integrated performance or risk measurement
- Implementation of additional asset classes to implement

**By identifying these enhancements soon after implementation, and adding them as quickly and cost-effectively as possible, the overall return on investment of your front office solution will exceed stakeholder expectations.**

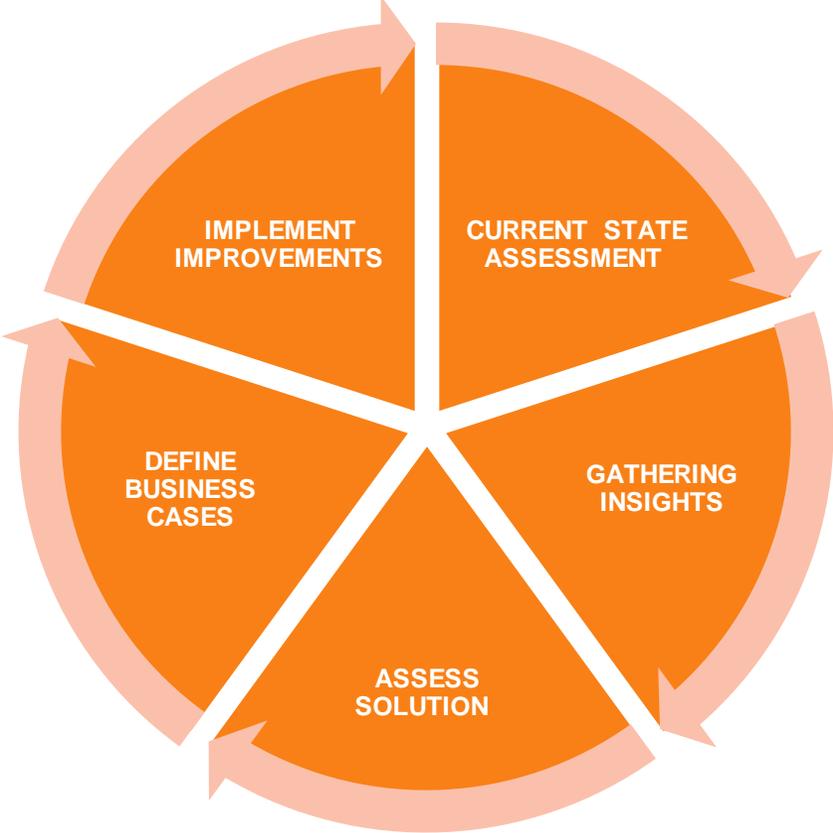


# Front office review methodology – The Elgin White approach

Our well-defined, proven process assesses your requirements vs. your structural framework, then translates findings into clear next steps that will deliver the value outcomes you expect.

- Recommend the most valuable business cases
- Deploy solution enhancements

- Define next steps and improvements
- Estimate resources and effort
- Analyze costs vs. benefits



- Assess solution versus initial requirements
- Quantify impact of major implementation choices

- Desired outcomes fit with the overall solution
- Unexpected outcomes from the implementation
- New ideas from use of the software

- Technical performance
- Automated processes and connectivity
- Data transfers and availability
- Workflows and user interfaces
- Efficiency of customizations



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