

CASE STUDY: GLOBAL INVESTMENT FIRM

STREAMLINING THE PROCESS INCREASED TRANSPARENCY AND ACCOUNTABILITY

COMPANY OVERVIEW

This organization is a leading global investment firm focused on alternative asset management, capital markets, and insurance solutions. As one of the largest private equity firms in the world, they use a multitude of investment platforms to strategically increase growth in their portfolio, companies, and communities within the international market.

THE BUSINESS CHALLENGE

In the world of private equity, data integrity, speed, and accountability have significant revenue implications to an organization's ability to grow and maintain a strong foothold in the space. As this organization continued to grow and expand their reach, their technology had not kept pace. Many of the back-office operations of the organization along with key components in the lifecycle of a fund, the execution of a deal and the management of their clients were being conducted over email and spreadsheets. This approach left the organization with numerous data silos, creating bottlenecks and numerous reporting and auditing challenges. This made it difficult to effectively coordinate the efforts to best manage the complex orchestration of their day-to-day transactions.



ABOUT ZIMPATICA

Zimpatica is a digital transformation company specializing in building workflow, process, and business applications on the Appian low-code platform. Through a highly collaborative and structured delivery methodology we work with our customers to build and maintain solutions fit for their specific needs. We cover the full lifecycle of application development and can implement full cloud, on-premise, and off-line solutions.



SOLUTION



Increased Automation



Workflow Standardization



Unified Experience

Recognizing the technical limitations of email and spreadsheets as a workflow management and orchestration engine, they turned to the Appian low-code platform to help support core business functions. Following the successful implementation of several key business applications, Appian has become a key component to their technological ecosystem.

As a strategic partner, Zimpatica has played an integral part in the expansion of the Appian platform to support complex business and operational workflows including end-to-end management of Deal Execution, Client Subscription management, and the creation and dissolution of Funds. To facilitate the overlap in workflows amongst these applications, a Compliance Management Framework was

built that automates these processes, including conflicts and sanctions resolutions. Additionally, in order to validate the contractual obligations for their clients, a Certifications Framework was created to facilitate and audit these processes.

RESULT

With the introduction of the Appian platform, this organization has immensely reduced its dependency on emails and spreadsheets and has increased transparency and accountability of core business functions throughout the organization. Through standardized workflows and a highly integrated suite of external systems connecting a vast amount of data into a single user experience, Appian serves as the connective tissue bringing data, people, and process together. As the organization continues to scale its Appian program, Zimpatica is in lockstep supporting the needs of the business by facilitating client enablement and creating the infrastructure to allow application delivery at scale.



Reduced dependency on email and spreadsheets



Increased transparency and accountability



Facilitated client enablement



Implemented delivery of applications at scale

WHATEVER INDUSTRY YOU'RE IN, WE CAN HELP YOU DO IT BETTER. CONTACT US TODAY.

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We are your on-demand team of Appian experts.

www.zimpatica.com