

Controlled Inter-Office Collaboration

As an early adopter of Advent Tamale RMS,[™] one investment firm chose the product after recognizing the benefits of consolidating their U.S. and London offices—and collaborating more closely.

The Challenge

This particular client is typical of many firms that have offices in distant locations, and for whom collaboration among multiple and international offices is a logistical challenge. In general, firms have teams and working groups that are spread across different offices and that need to operate as though all team members were in the same place. There's an urgent need for information to be centralized.

Investment professionals and their firms must be able to effectively manage the information they gather on their investment ideas—and then easily find any single piece of research quickly. This task is daunting because data vital to investment professionals is generally scattered across multiple systems and applications that are not designed to support the research process in concert.

- Meeting notes live on an analyst's PC.
- An insight from a broker is buried in email.
- Research data from an independent provider reside on a shared drive.
- Contact information for a relied-upon industry expert is in Microsoft Outlook[®].
- Earnings expectations are on the web.

Additionally, the changing research landscape has made the research process itself more complex and time-consuming for analysts and portfolio managers. Investment professionals now produce more internal

"Our business is based on human capital, our most important investment is human capital, and we need to leverage that. We're all about information and the biggest barrier to better performance is information dissemination—Tamale helps us leverage information, it helps us (analysts and PMs) understand the commercial aspects of our decisions. Tamale is key to our competitive advantage and is more useful than we thought it would be in many ways."

Advent Tamale RMS Client

"It is hard to imagine our company without Tamale. In fact, without Tamale RMS, many tasks that are now routine to us would be impossible. The competitive advantages we experience include speed, simplification, and easily implementable options—especially those that allow for efficient use of our deep research. Tamale RMS has really helped us to view, access, and act on all our research, across all our offices, in real time."
Advent Tamale RMS Client

research than ever, are inundated by an ever-larger collection of news and broker research, and rely on broader sources of information than they did just a few years ago.

The Solution

Advent Tamale RMS is a software solution that helps investment professionals easily manage and access all the information related to a particular investment idea. It can also enhance collaboration among groups and offices. Advent Tamale RMS does this by making it easy to store all of a firm's data in one place, to organize it around the investment processes and preferences of a firm, and then access and retrieve it in a multitude of ways.

Importantly, Advent Tamale RMS enables investment professionals to fully centralize research materials—for the purpose of genuinely efficient collaboration, joint idea-generation, consolidation of work in general, and enhancement of valuable "institutional memory." And of course, while collaboration is enabled, privacy and security are always enforced. With Advent Tamale RMS, if clients prefer to limit information access between or among work teams or offices, this can easily be so configured.

The Result

This firm's U.S. and U.K. offices now collaborate more effectively than ever. The research process is integrated with research data accessible to relevant team members in a manner that is virtually effortless. In this case, Advent Tamale RMS was able to rapidly and successfully create and implement an integrated, user-friendly solution exactly aligned with the client's specific needs. The firm's investment professionals' own input was used in the design of a streamlined processing environment that offers requisite flexibility and scalability—particularly essential in the firm's expected continued growth.

To read more case studies, visit www.advent.com/casestudies.

About Advent

Advent Software, Inc., a global firm, has provided trusted solutions to the world's leading financial professionals since 1983. Firms in 60 countries use Advent technology and manage investments totaling US\$18 trillion. Advent's quality software, data, services and tools enable financial professionals to improve service and communication to their clients, allowing them to grow their business while controlling costs. Advent is the only financial services software company to be awarded the Service Capability and Performance certification for being a world-class support organization.



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Advent Software, Inc.

600 Townsend Street, San Francisco, CA 94103, USA
+1 800 727 0605 +1 415 543 7696

Level 8, Two Exchange Square, 8 Connaught Place
Central, Hong Kong
+852 2297 2280

One Bedford Avenue, London WC1B 3AU, UK
+44 20 7631 9240

www.advent.com



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