

# Case Study: Investment Firm's Journey in Handling Rapid Business Growth



## Finance & Accounting



Location:  
Connecticut  
(USA)

### Company Background and Goals

An investment firm at the nexus of economics, behavioral finance, data, and technology venturing in mutual funds and investments. Their investment policy is based on 3 core principles; **Equities, Fixed Income** and **Financial Alternatives**. By applying these principles, they seek to deliver sustainable, long-term value for their investors.

Their company's strength is using both qualitative and quantitative tools where they can meticulously assess every detail of the investment process for their clients with the goal to deliver sustainable, long-term value for their investors.

### Company Challenges

This company has an existing partnership with Infnit-O but was experiencing a major surge in growth and therefore required an evolution of that partnership or they would have to look for an alternate partner.

They needed the additional support to overcome the following challenges:

- Internal operations were unable to keep up with spiraling workload
- The **need to rapidly hire and expand their workforce, particularly in the middle and back office support functions, without any reduction in quality or productivity**. But on-shore alternatives are expensive and were beyond their operational budget
- They required skills and talents to **automate their internal operational processes**, to drive efficiencies and support client acquisition
- Finding a **true and trusted partner instead of a simple vendor relationship**



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## Infinit-O Solutions and Team

Infinit-O lived up to our promise that we will not only provide operational support but will also grow alongside with the client in order to effectively provide the necessary resources and the ability to build a great team that can handle rapid business expansion.

- **Increased the team size to 150% within 30 days of implementation** utilizing our A+ recruiting and hiring process
- Some of the new roles included:

### **Certified Financial Analysts**

- Finance, research and qualitative background
- Responsible for tracking a company's financial performance
- Analyzes business performance and market conditions to create forecasts

### **Portfolio Operations Specialists**

- Entail reconciliation of cash, positions, market values, trade breaks, P&L analysis, corporate action analysis and monitoring of cash flows
- Contribute in the development and enhancement of the F&A systems and processes
- Understanding of general fund accounting principles

### **Payment Collectors**

- Recovers overdue payments on accounts
- Track debtors down by phone or mail and assist them to make payments by negotiating repayment plans, and encouraging them to find alternative payment solutions

### **Market Researchers**

- Background in data management and analysis
- Conduct research on relevant information
- Report any discrepancies on the brands in the database and identify improvements on the processes and rules as necessary
- Gathering data for the finance team to capture the sentiments of the market

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## Risk and Legal Compliance Managers

- Expertise in quantitative investment strategies
- Risk Reporting & Monitoring
- Risk Investigation
- Communicate escalations and results of investigations to the appropriate parties
- Review of Critical and Management Reports

## Others

- Established an organizational development process for each of the individuals providing career pathing and increased value for both the customer and Infnit-O
- **Projected operational savings of 80+%**
- Teams were trained and ready to go live **in just 2 weeks**
- Established performance metrics and success plans including:
  - SLA – KPI metrics
  - Team member performance - Attendance, Productivity and Quality
  - Detailed growth plan
- Collaborated on multiple process innovations, including automation, and tool improvements to enhance productivity and quality performance



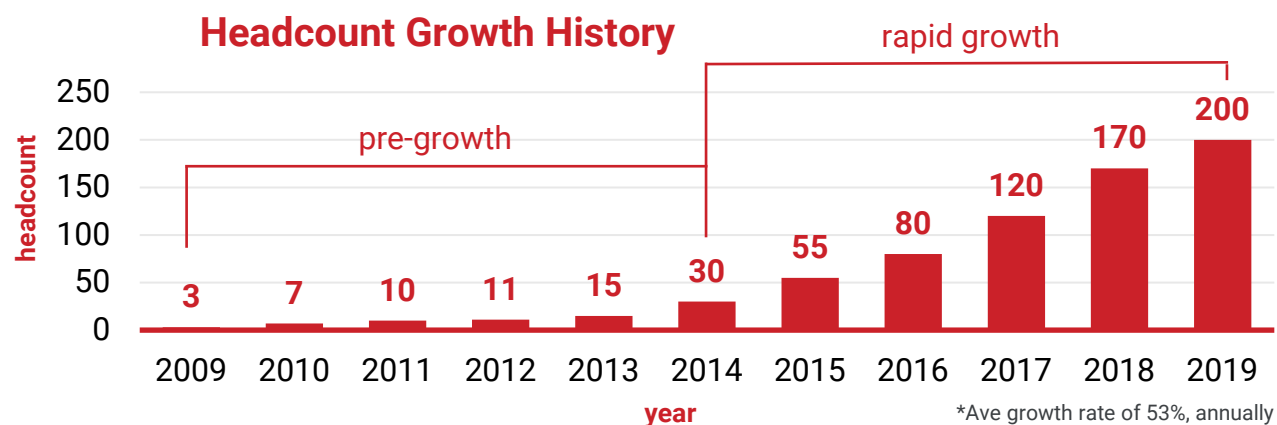
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## Partnership Net Results

The solutions were executed well, and as a result, they were able to overcome the existing and perceived challenges.

- **Successfully scaled their multiple critical operational support teams**, hiring the right people for their unique expansion needs



- Increased headcount growth by 53% annually over several years
- The **company was able to save 87% on labor and operating costs**
- The Infinit-O team was able to **meet the workload demand while exceeding quality, productivity and people targets**
- Additionally the partnership resulted in **upskilling and reskilling several new functions**
- Exceeded SLAs and KPIs targets such as **>95% encoding accuracy and submission timeliness**
- **Effectively transitioned manual coding to automated dashboard and macros for faster yet more accurate data encryption**
- The hybrid business model resulted in the creation of an innovations team **dedicated to creating new projects, platforms, automating key processes. This team was also responsible for designing industry specific technology and software** needed for continuous process innovation
- The collaborative **efforts through the use of Visual Basics for Application (VBA) and Python** saved the company approximately **10 thousand hours in operational labor** over the last 3 years



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## Key Benefits

<b>Cost Reduction</b> Expect high quality & productivity with a 70% savings on operational costs.	<b>Scalability</b> As your business demands shift, so can your Infinit-O team.
<b>Access to Excellent Talent</b> Our world-class "A+ Recruiting" process attracts world-class talent, with an industry-leading retention rate.	<b>Operational Excellence</b> Collaborative Service Level Agreement, metrics-intensive performance, and open communication.
<b>Trusted Partnership</b> Have confidence with our >97% client retention rate and 72 NPS score. ISO 27001 and 9001 certified, GDPR, HIPAA and DPA2012-compliant	

After 12 years of partnership and more to come, Infinit-O continues to collaborate with this growing company to help them expand by building a great, high performing F&A team and incessantly support them in process innovation until they reach their fullest potential.

They started small, we exceeded their expectations and helped them grow their business making our partnership stronger.

**Because when you're ready to grow, think of Infinit-O.**

Start small. Exceed expectations.  
Think infinitely. Think Infinit-O.

Contact Us

