

# Case Study: Surviving & Thriving During a Financial Crisis



## Finance & Accounting



Location:  
Connecticut  
(USA)

### Company Background and Goals

A global investment management firm dedicated to finance and investment that also ventures in pension funds (i.e. teachers) by managing money and using investment strategies to grow pensioner's finances.

They continuously explore diverse financial markets through research and data and how it can be applied to their client's portfolios. This company aims to deliver sustainable, long-term value for investors relying on economic theory and analysis

### Company Challenges

A fast growing F&A company and one of the first investment managers to introduce alternative strategies in mutual fund format. But they faced the following setbacks which curbed their business expansion during the financial crisis in 2008:

- Client portfolios underwent bankruptcy
- Need to lay off expensive on-shore employees (many with specialized skills and experience)
- However, they experienced a significant increase in workload to manage the financial crisis-driven demands
- The need to restructure business processes and create fresh strategies in order to weather the crisis



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## Infinit-O Solutions and Team

To circumvent other institutional loss from the financial crisis, the company partnered with Infinit-O to get back-up support in operational responsibilities and help them overcome challenges by:

- **Speed to market recruitment process by establishing an initial team of F&A experts** within 30 days

- **Built a great initial high-performing team:**

### **Fund Accounting**

- Degree in Financial Management, Economics, Accounting or other related business course
- Develop and utilize US GAAP accounting standards relevant to Investment Management
- Responsible for reconciliation of cash, market values, trade breaks, corporate action analysis

### **Portfolio Accounting**

- Degree in Financial Management, Economics, Accounting or other related business course
- Analyze fund performance
- Review investor movements and ensure financial compliance

### **Monitor and Control Specialist**

- Degree in Financial Management, Economics, Accounting or other related business course
- Maintain financial regulation and process compliance
- Research and resolve accounting discrepancies and booker reports

- **Projected operational saving of 75%**
- Teams were **trained within 2 weeks** to adapt to the company's internal process
- Implemented process innovation making a faster workflow yet accurate
- Revolutionized simple F&A formatting and data entry to more sophisticated coding software and applications
- Established performance metrics, KPIs, and SLAs to measure and track performance

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## Partnership Net Results

This value added partnership with Infinit-O went beyond their basic expectations. The solutions curated for them assisted in overcoming the challenges and yield great results such as the following:

- **Infinit-O F&A team helped the company survive and overcome the 2008 financial crisis**
- **Successfully replaced on-shore talents with off-shore talents, while saving 75%+ in labor and other operational costs**
- **Successfully met the increased workload demand**
- **Process automation resulted in supporting more clients and in return drive more revenue**
- **Modernized process and upgraded tools** resulted in a more seamless workflow which later on helped the company expand their business
- **Exceeded SLAs and KPIs: >95% encoding accuracy and submission timeliness**



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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 great client to build and grow great, high performing F&A teams (having now expanded to >150 team members).

We continuously work together in reaching their business goals and press on with ceaseless process improvement, innovation and development.

**They started small, we exceeded their expectations and we hope to continue to grow the partnership for many years to come.**

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

## Contact Us

