



Modernizing the distribution of investor reports

The Challenge

As a newcomer to the trustee space, our customer relied on email to distribute investor reports.

However, this was no longer a viable option due to:

- an increasing internal demand for controls and delivery transparency around the process to reduce the operational risk
- requests from investors to be able to integrate the investor reports directly into their systems via API

Our client needed a solution that addressed these challenges and established them with a credible online investor reporting presence.

How StructureIt helped

StructureIt deployed a product-based investor reporting solution in 4 months. The delivery included migrating all deals, users, and historical documentation into the solution.

The introduction of an automated document collection process alongside a simple approval process to publish reports has created efficiency and controls across multiple internal teams, leading to the faster and more accurate availability of reports.

As an extension to the original scope, the customer's service providers can also upload documents directly into the solution, shortening the time spent collecting documents from multiple deal parties before investor distribution.

Investors can quickly access the information they need through an intuitive user experience. The API-first delivery approach ensures that documents and data can additionally be shared via API as needed.

The Results

Our client now has a best-in-class investor reporting solution that has received high praise from investors and internal users. The client's managers spend less time collating and emailing documentation, allowing them to spend more time addressing broader client needs. There is reduced operational risk from the auditable and traceable trail of information—what is being published, to whom, and from where.

The solution has been extended to include enhancements to differentiate our client from other trustees in the market and is designed to drive business. The overall cost of ownership is low while delivering maximum value.



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