



# Reimagining the deal and client lifecycle

## The Challenge

After years of growth, the client's deal management system had become dated and disconnected. There were different regional systems with distributed processes, which resulted in no common clean data sources to support reporting and insights across the business.

Alongside this, costs and controls of existing legacy systems were a growing concern. Changes needed to these legacy systems were often lengthy and expensive, and included conflict over data maintenance and ownership.

Finally, the risk and cost associated with the Know-Your-Customer process was very high. The existing KYC system was rudimentary and resulted in either unnecessary, expensive KYC reviews which frustrated customers or insufficient KYC monitoring which posed potential risk to the organization.

## How StructureIt helped

The turning point for our client was a reactive response to a regulatory request around KYC – which put a huge strain on the business.

As a result, StructureIt was asked to lead the implementation of a revised solution, aimed at:

- controlling the onboarding and management of deal data from the point of winning the work through the pipeline process
- bringing together all regions into a global process, allowing for architectural simplification across the business

StructureIt delivered a new workflow-based solution to facilitate a unified global process. At the core of the solution was an innovative, event-based streaming platform to ensure new data is easily leveraged across the organization.

Over the course of 18 months, the deal enrichment and pipeline process was largely automated and supported by a single user interface, serving as the nexus for deals and entities to ensure an accurate clear client perimeter.

*“ I have been so impressed by the way that StructureIt have worked with our technology teams to deliver a complete transformation of the way our systems and architecture work. ”*

## The Results

By injecting our domain expertise and technical skills into the organization alongside our client's technical teams, our client is now working off a fully-service based solution.

By introducing a single, scalable solution with StructureIt's help, our client has:

- Cost savings in excess of \$5m across the deal and client lifecycle
- Reduced operating cost by decommissioning 3 legacy systems
- Standardized the deal and client management process globally, replacing 4 existing disparate processes such as manual pipelining
- Introduced the highest quality data from key integrations across the organization
- Improved regulatory response time through a simplified architectural infrastructure and reduced development turnaround time