

FOS helps a large health care organization increase its transparency and operational efficiency

Furthering the client mission to deliver value to doctors, patients and other stakeholders.



CLIENT BACKGROUND

The client is a large \$25B AUM organization with extensive leadership in the healthcare industry. As a non-profit organization, the clinic reinvests all earnings into giving patients high-quality care, finding answers to the toughest medical cases and training the next generation of doctors and researchers.



THE CHALLENGE

Initially, the client was looking to replace its proprietary Content Relationship Management (CRM) system and create a centralized data repository that housed their portfolio research material and reporting. However, while researching providers, the client realized they wanted a solution that not only addressed one need but also could service multiple needs. In addition to seeking a CRM system, the client was looking for a solution that could aggregate its complex data into one repository to show a complete portfolio picture in an efficient, and timely, manner.



THE SOLUTION

The client narrowed their selection to Northern Trust Front Office Solutions (FOS) and one other provider. The staff appreciated the value of a single holistic solution that could support both their quantitative and qualitative data. They were also impressed with our asset class expertise, understanding of their data requirements and the ability to provide comprehensive implementation services for initial onboarding.



THE RESULTS

Our technology and service offerings helped the client alleviate cumbersome data management and reporting pressures. The technology and service the client was able to access through FOS has greatly increased transparency into its workflow, while also increasing operational efficiency. Through FOS, staff can better manage documents

and understand underlying portfolio exposures across disparate sources. Moreover, they can access a centralized database to improve collaboration and business continuity. By eliminating time-consuming manual processes related to investment operations, the health care organization has been able to focus on its investment strategy to further its mission of delivering value to patients, doctors and other key stakeholders.

“Northern Trust Front Office Solutions has streamlined our investment process—we can manage multiple, complex portfolios with one provider who has asset class expertise, ability to understand our unique data requirements and leading technology capabilities.

-- Director Investment Operations

“Before FOS, we spent significant time in spreadsheets to gain an accurate picture of our portfolio. As our team continues to adopt functionality provided by FOS, we can focus on newer and higher value activities.

--Senior Investment Officer

CONTACT US

To learn more, please contact your Northern Trust relationship manager or:

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