



# Top 5 Reasons Managers Need a Research Management Software (RMS)

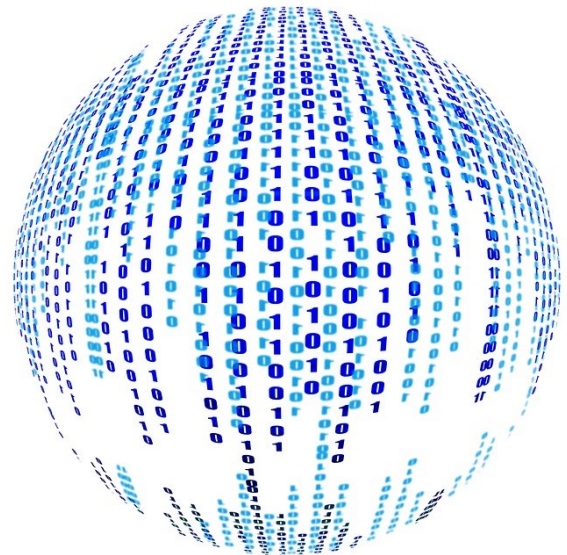
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In today's competitive market, research management software (RMS) has become a must-have integrated feature for fund of funds, wealth advisors, family offices, E&F, pensions, consultants and investment management firms. Significant benefits offered via RMS have caused a ripple effect of soaring adoption rates across the global investment industry. In this article we'll examine how adopting a research management solution could benefit your firm.

## Central Repository

With offices, colleagues and clients spread across the world, firms need to consolidate data in an organized fashion. From meeting and call notes, to due diligence, audits and analyst reports, the demand for readily accessible information is ever burgeoning. Storing information within multiple programs and folders not only welcomes disorder and the opportunity for digression in the workplace, but also increases costs and wastes valuable time. This prehistoric method of aggregating data has been replaced with advanced RMS, a much more viable, flexible and comprehensive solution.



Hosting a firm's data within a user-friendly, central repository simplifies processes, optimizes productivity and uncovers new business opportunities. When selecting a RMS, investment teams may consider a generic or industry-specific product. While both options present benefits, the latter assimilates seamlessly with an investment firm's daily workflows, terminology and diverse range of data. An ideal RMS will also offer customization, accessibility and integrate with other applications, such as Outlook.

## Meeting Regulatory Expectations

As the regulatory environment continues to intensify, RMS has evolved into a vital component in establishing a complete compliance strategy for asset allocation funds. In an attempt to build a more transparent, accurate investment market, the U.S. Securities and Exchange Commission (SEC) has adopted rules that require firms to document company finances, policies, procedures, etc. RMS enables managers to easily search the repository and export queried data with just a few clicks of a mouse.

Enhancing the efficacy of the due diligence process, a robust RMS will manage, amass and report on both quantitative and qualitative due diligence data. This feature augments synergy and facilitates collaboration firm-wide.

## **Fostering Relationships**

Industry-specific RMS dives deep into the complex layers of fund due diligence and investor relations, enabling professionals to monitor interactions, track communications and identify accounts that deserve further attention. Additionally, RMS helps managers stay on top of priorities and ensure deliverables are met through task management tools. These features work in harmony to streamline investor relationship management and accelerate workflows, allowing managers to allocate more time towards nurturing relationships and growing business.

## **Reporting Efficiently and Accurately**

Unlike generic solutions, RMS tailor-made for alternative investment firms presents data in an instinctive manner appropriate to the industry. Customized reports and configurable dashboards offer real-time insights into a firm's operations, improving analysis of interactions, portfolios, relationships and pipeline activities. Through powerful reporting capabilities, managers are able to evaluate data at a granular level, make more informed investment decisions and pave the pathway for success.

## **A Brighter Tomorrow**





RMS empowers companies to evaluate operations and establish best practices, foster relations, attract investors and fuel returns. The multitude of built-in features within a tailored RMS ensure consistency across an organization and provide a leg-up against competing standard solutions. Companies that lack a RMS may be left in the dark of inefficiencies and missed deliverables, which could lead to bigger issues down the road. Additionally, firms may be overlooked by potential investors due to a deficiency of RMS adoption when compared to software equipped third-party providers. When it comes to the future of your firm, driving growth and expansion through the measureable benefits of a research management platform drastically outweigh the costs of missed opportunities.


## ABOUT LEDGEX SYSTEMS

Ledgex Systems is transforming the way fund of funds, endowments and foundations, pensions and family offices, and hedge funds and private equity firms manage their portfolios and client relations, make investment decisions and meet investor demands. Ledgex is a powerful platform with an integrated technology suite that streamlines front and middle office functions of investment management firm. The comprehensive suite delivers solutions for: Portfolio Management & Analytics, Research Management, Liquidity Management, Investor and Client Relations and Due Diligence.

For more information on Ledgex, visit our website at [www.ledgex.com](http://www.ledgex.com) or call +1-877-700-1921.

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