



## Eliminating manual tasks, Increasing visibility with a centralized reporting tool.



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### CHALLENGE

An alternative asset management firm relied on labor-intensive and disjointed processes across multiple systems to maintain documents, monitor deal progress, and manage investments. While these activities were critical in supporting investment decisions, the fact that they were manual and error-prone diverted valuable analyst time and attention. These inefficiencies ultimately undermined their ability to track precise metrics and report on investment returns.

To remain competitive, the firm needed a light-weight but flexible replacement to eliminate manual task tracking, reduce the analyst effort required to manage deals, and serve as a centralized reporting tool so that decision-makers within the firm would remain informed of key metrics and status. To capture the full benefit of a digital platform, the solution also needed to provide a frictionless end-user experience by seamlessly integrating with their existing infrastructure.

### SOLUTION

Macedon's solution leverages the firm's existing web portal and provides a rules-driven process. The new system enables consistent deal tracking and automated status communication while providing role-based access. The application connects multiple data sources to surface up-to-date deal and security information, reducing manual data entry and helping the deal-team move the process forward. The system automatically sends timely notifications to users to drive awareness around urgent action items.

Our solution introduced context-driven dashboards to increase visibility for team members. These dashboards highlight critical deal information, enabling analysts to take quicker action on high-priority deals. Open action items and key performance indicators round out the dashboard for a holistic view of the investment lifecycle.

### RESULT

By effortlessly capturing deal information and reconciling data sources from across the firm, Macedon's solution enhances visibility throughout the investment lifecycle. A reduction of redundant effort coupled with an increase in ease-of-use frees up valuable analyst time. Automated processes encourage timely upkeep of data while integrated business rules enforce accuracy, resulting in reliable and up-to-date investment return metrics.