

# Modernized legacy technologies for **future-proofing** business needs

Deployed adaptable and scalable platforms for  
a global financial investment firm

Established in 1947, our client is one of the most respected global financial investment firms. With 600+ experienced professionals working across 25 countries, the client specializes in providing outstanding asset management services to an extensive range of customers. As part of a constantly evolving industry, they faced consistent pressures and novel opportunities. By partnering with HCLTech, our client was able to manage these expectations by digitalizing their legacy reporting platform and introducing automation into their migration process for more efficient operations.

## The Challenge:

### Keeping pace with changing business needs

The client was immersed in a highly dynamic industry with rapidly changing conditions and opportunities. To remain competitive, the client had to continuously innovate and adjust its strategies according to changes in the market. Furthermore, they needed to problem-solve quickly while adapting their solutions across different operating

environments. It was essential that the client remained agile and flexible enough to respond swiftly to new value propositions or challenges. They had to stay ahead of the game by staying up-to-date on trends and developing creative solutions in order to maintain success.

## The Objective:

### Transforming legacy sales reporting with modernization and migration

The client needed a comprehensive solution to meet the challenges of today's ever-evolving business landscape. To stay ahead of competitors, they sought a partner that could help them digitalize their legacy

global sales reporting platform, embed automation in their migration process for smarter Snowflake operations, as well as implement global sales and asset marts (GSAM).



## The Solution:

### Iterated approach to implementing centralized data management platform

We leveraged our 15+ years of experience in the industry across multiple geographies, working with leading global investment managers, custodians and fund managers to implement domain-led IT solutions bolstered by third-party product competency. This enabled the global adoption of Snowflake and standardization and automation in the legacy data platform migration to Snowflake.

In addition, we modernized 1379 base tables, 445 aggregate tables, 390 files and 1414 jobs to Snowflake Cloud on AWS. With the acquisition of another company, our client was able to offer two independent accounts of Snowflake on AWS and Azure which further enabled advanced analytics capabilities for sales and asset marts.

## The Impact:

### Smarter operations, integrated advanced analytics enabling sales prediction

We delivered game-changing results for the client through our integrated approach and capabilities. We successfully implemented a Snowflake-powered centralized data management platform, deployed adaptive and scalable platforms to meet changing business needs and replaced legacy technologies with rationalized data objects leading to smart operations and integrated advanced analytics capabilities to enable sales predictions.



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