

Case Study

Celebrating ten years of successful client reporting for a leading global investment manager

Located in 28 countries, Pioneer Investments has assets under management of €224 billion as at 31 October 2015

About

Founded in Boston in 1928, Pioneer Investments is a trading name of the Pioneer Global Asset Management S.p.A. group of companies. Pioneer Investments is a global investment management firm with 2,020 employees in 28 countries and €224.7 billion in assets under management as of 31 October 2015.

Pioneer Investments offers a diverse range of products across both traditional and non-traditional asset classes to clients that include institutions, corporations, intermediaries and private investors around the world. The firm has three Global Investment Centres in Boston, Dublin and London.

Goals

Pioneer Investments has experienced continued growth in its institutional business. A client reporting platform was required that could be rolled out for client reporting hubs globally. Key requirements included to support data collection from numerous source data systems, provide consistent branding and allow for a high level of client customisation. A scalable platform was required, with the ability to manage the data collection process seamlessly and allow for validation of data sources.

Approach

In May 2005, a global project team was established to address these concerns. After digesting detailed RFP responses, workshops and proof of concepts with a number of vendors in the market, Pioneer Investments selected Vermilion Software as its global solution provider for client reporting. Pioneer Investments commenced the rollout of Vermilion Reporting Suite shortly after the RFP process, in January 2006.



Client

Pioneer Investments is a global investment management firm with offices in 28 countries.

Challenge

Automation of reporting to support a fast growing institutional business. End users are client reporting teams, IT analysts and other staff in Boston, Dublin and Milan.

Solution

One instance of Vermilion Reporting Suite, utilised globally as a truly enterprise-wide client reporting solution.

Results

Benefits include high quality client reports, with consistent branding and data accuracy plus the ability to scale.

Results

Pioneer Investments has installed one instance of Vermilion Reporting Suite, utilised globally as a truly enterprise-wide client reporting solution.

Vermilion enabled Pioneer Investments to streamline its entire reporting operation.



REPORTING SUITE®

Empowered Reporting



Data validity and accuracy are assured as the collection from source is now automated and trusted. Calculation checks are performed as well as cross-validation of data sources.

Even branding is reinforced by the delivery of consistent and globally accessible reporting templates, with significantly improved output presentation. This is further complemented by the availability of multilingual features that suit a global client base.

Christine Griffin, Vermilion Application Manager at Pioneer Investments:

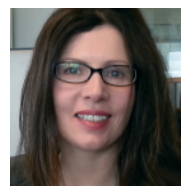
“Vermilion Reporting Suite is both scalable and flexible, incorporating a comprehensive workflow facility. The product is intuitive and endeavours to address every issue faced in client reporting: data; branding; commentary management; workflow; translations and reusable libraries of styles, data connectors and components. Furthermore, Vermilion’s consultants demonstrated an excellent understanding of our environment and have many years’ experience in institutional client reporting.”

Vermilion consultants were deployed for the initial implementations between 2006 and 2008. Since then Pioneer Investments has been self-sufficient, with responsibility for: upgrades; additional implementations; and report or data feed developments that have further leveraged the solution.

Anne Pataky, Head of Institutional Client Services at Pioneer Investments:

“Automation is the key to sustaining a scalable client reporting infrastructure. Vermilion Reporting Suite has enabled our team to manage a constantly increasing client list and meet their demands with trusted data.”

“ Vermilion’s consultants demonstrated an excellent understanding of our environment and have many years’ experience in institutional client reporting.”



Christine Griffin,
Vermilion Application
Manager at Pioneer
Investments

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Anne Pataky,
Head of Institutional
Client Services at
Pioneer Investments

Contact us

London Office

Vermilion Software Ltd
1 Carey Lane
London
EC2V 8AE
United Kingdom

Sales: +44 (0) 20 7234 3080

Boston Office

Vermilion Software Inc
50 Congress Street
Suite 500
Boston
MA 02109
USA

Sales: +1 617 279 0799

Singapore Office

Vermilion Software PTE Ltd
8 Marina View
Asia Square Tower 1, Level 07-04
Singapore 018960
Singapore

Sales: +65 6407 1060

Sydney Office

Vermilion Software PTE Ltd
Level 34, 50 Bridge Street
Sydney
NSW 2000
Australia

Sales: +61 (0) 2 8216 0950



VERMILION®

Sales Email sales@vermilionsoftware.com

General Email info@vermilionsoftware.com

vermilionsoftware.com

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