

Operational Agility Review

Today's industry challenges require an asset manager to have an operating model that has the agility to solve for rapidly evolving business needs.

Olmstead's Operational Agility Review (OAR) will quickly provide a broad-based view of your organization's strengths and challenges in flexing the operating model to address future demands that inevitably, and often unpredictably, will head your way.

FOCUS AREAS



DATA

access
storage
enrichment
governance



PEOPLE

skills assessment
utilization
org design



PROCESS

operational efficiency
target model
workflow optimization



TECHNOLOGY

platform review
technology
assessment

What is the OAR framework?

Olmstead's OAR framework consists of a series of operations, data and technology reviews targeted on strategic processes. It provides an end-to-end review from front office/client-facing delivery through back office sourcing and execution.

Who can benefit from an OAR study?

New CEOs or COOs seeking an independent assessment of their operations, asset managers undergoing M&A activity, and those in need of an outsourcing or technology assessment are all excellent candidates.

How is the OAR framework different?

Historically traditional operational reviews were executed in silos focusing on a specific business component. Although slight efficiency gains may have been achieved, they often fail to benefit the end consumer.

What is the outcome of an OAR study?

An OAR study will produce a list of actionable initiatives, a strategic roadmap, and will benefit from the use of one or more of the transformation levers below.

TRANSFORMATION LEVERS



Sourcing Strategy



Operating Model Redesign



Technology Strategy

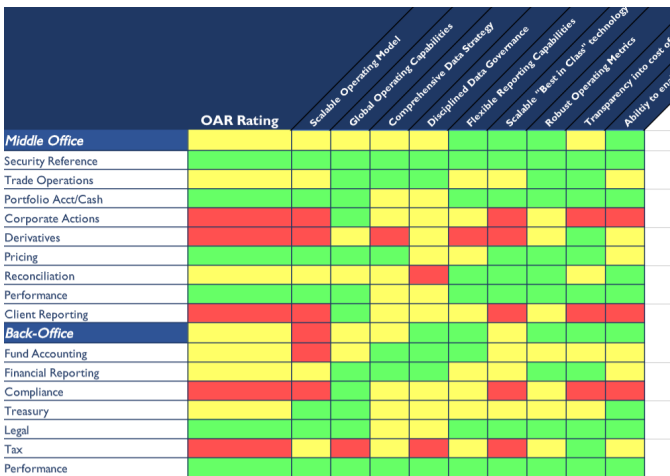


Data Optimization



Advanced Technology

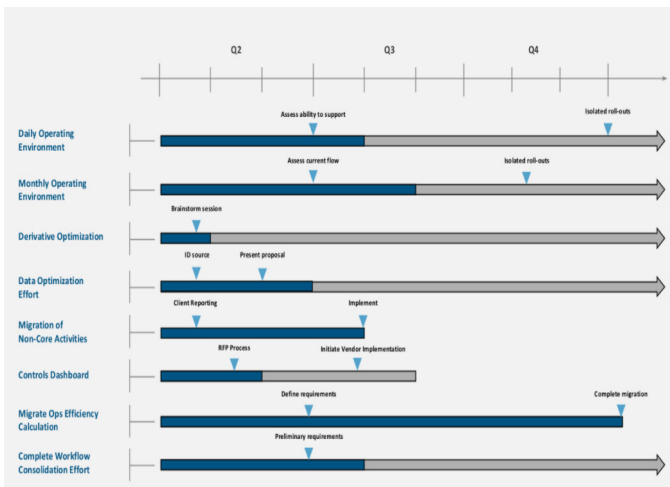
An OAR Study results in a set of comprehensive and actionable outputs enabling future initiative planning.



OAR Dashboard

The OAR dashboard provides a view of your firm's operations and highlights areas of concern.

The dashboard is accompanied by a summary report which outlines details supporting the scoring and also provides a qualitative assessment with recommendations.



OAR Strategic Roadmap

After completing an initial review, the strategic roadmap provides a path forward for execution.

Is your business positioned for change?

Strategic Vision. Pragmatic Approach.

Olmstead can help get you there.



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