Top-Five Must-Have Communications Capabilities for Investment Managers

More than 300 investment firms rely on SS&C to execute their client engagement and communications. Here are the five most common client communications requirements we encounter — all met by Vision FI.

1 Source comprehensive data

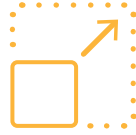Access data directly from multiple, disparate sources

Eliminate the requirement to repetitively extract, transform and load/reload data

2 Provide maximum design flexibility

Provide intuitive, powerful drag-and-drop tools to design reusable components and compose templates

Meet requirements for client- or deliverable-specific layouts and preferences

Keep track of the content development, status and approvals workflow

3 Ensure accuracy

Surface risk conditions, data anomalies and processing issues clearly via custom-tailored checks

Use exceptions-based workflows for content approvals

4 Enable multi-channel client engagement

Ensure unified content across print and digital forms
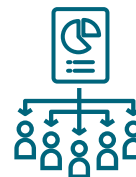
Access usage metrics to gauge client engagement

5 Deliver a custom client experience at scale

Handle reporting complexity with flexibility and efficiency

Mass-produce tailored, client-centric high quality content

Distribute accurate, on-time communications while meeting the custom and evolving needs of clients

Our clients tell us that having these capabilities via Vision FI results in many satisfied customers – who receive exactly what they need, when they need it and how they want it. Vision FI can be deployed on premise or as a hosted solution to streamline client reporting and communications, boost efficiency and accuracy, and delight clients. **Ask us how we could do the same for you**.

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SS&C