
Project Case Overview

An investment management company needed to better understand what the Canadian marketplace had to offer for a Portfolio Management System (PMS) that would better support its custom offer. The firm wanted to remain anonymous to the marketplace and have Resolute act as its proxy in this project.

Resolute produced a high-level business model along with the key business requirements that a PMS solution would need to meet.

The search and analysis produced a short list of candidates with licensing costs, customization sizing estimates and level of fit with the business model of the firm.

Project Scope and Objectives

- Obtain current information on Portfolio Management Systems
- Identify customizations needed along with sizing estimates
- Produce a short list of qualified vendors meeting the criteria

Key Client Benefits

- Minimal internal resource time spent in research
- Concise high-level information aiding informed decision making

Key Activities

- Work with client to define business requirements and future strategy
- Define high-level business model and system interfaces
- Marketplace search to prepare a list of vendors
- Refine vendor inquiry based on key needs and identified criteria
- Interact with vendors through a Request for Information (RFI) and presentations
- Analyze gaps between requirements and vendor offer
- Evaluate, short list and estimate

Major Deliverables

- Business requirements document
- Portfolio Management System inventory
- RFI document
- Vendor responses and materials
- Evaluation and ranking matrix with a short list of qualified vendors

Length of Project

- Two months

RTS Resources

- Analyst
 - Delivery Manager
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