

Investment Management



2015 Q1 Spring Update

Solvency II is now affecting the Investment Management industry. This is being driven by Institutional Insurance Clients needing data and visibility on fund products to satisfy their regulatory reporting requirements. Solvency II is also driving the TPA's to look at their product offerings and their client needs. A number of acquisitions/mergers are now moving into the execution phase with a number to commence:

- TAM – Columbia (Ameriprise group)
- Aviva Investors – Friends Life

Many organisations are looking to Globalise and streamline their offering, these efficiencies are coming from scalability and a more coherent internal operating model. Some companies are looking to streamline front to mid office processes to be able to launch new products and offerings in emerging markets quickly whilst still adhering to regulation.

A number of different Investment Managers are looking at one single common IT platform from front to back to consolidate investment flows whilst managing all their data for reporting and regulation purposes.

Projects we're seeing a lot of include; Solvency II driving the data space, business integrations across multiple regions, digitalisation of customer experience and internal functions, more targeted client reporting having an impact on data projects across the board, and M&G are building an IBOR whilst UBS AM are looking at a simpler and practical data consolidation exercise.

People that are in demand at the moment possess experience within data and regulatory, people with digital experience from outside of the industry, experience of System Integration, and people with Distribution Experience

There is an equal demand for contract and perm headcount as different businesses are in different periods of the investment cycle. The industry is gaining momentum and there is an increased appetite for change professionals highlighting a skills shortage which will only further contract work in the near future.

Capability Matrix

IT	Operations	HR	Finance
Programme / Project Director, Manager, Change / Transformation Manager, Business Analyst, PMO			
Senior Architect – Applications, Data, Business, Infrastructure Head / Lead Developer Application Development Test Management	Operational Risk Manager Operational Manager Lean / Six Sigma Consultant Operational Effectiveness Target Operating Models Operations Analyst Service Management Process Analyst Business Process Manager BPR Consultant	HR Transformation Consultant Cultural Change Consultant Organisational redesign	Regulatory Change Consultant Solvency II Analyst / Consultant Finance transformation Manager Dodd Frank, FATCA, RDR

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