

CASE STUDY

Brunel Pension Partnership on-boarding to Reporting as a Service



Client reporting and fund factsheets. Re-imagined.

Brunel Pension Partnership is one of eight national Local Government Pensions Scheme LGPS Pools, and the second to select Opus Nebula. They selected our **Reporting as a Service®** to deliver improved quarterly investment reviews and fund factsheets. Which were redesigned, automated, and offer increased flexibility. Our cost-effective and affordable solutions are not only re-imagined but future-proofed too.

REPORTING AS A SERVICE®



A desire to re-design and improve the reports, automate the report production process and deliver the reports on time – every time.

Brunel Pension Partnership is one of eight UK Local Government Pension Scheme pools and the second to select Opus Nebula, bringing together £35 billion of investments of ten like-minded funds: Avon, Buckinghamshire, Cornwall, Devon, Dorset, the Environment Agency, Gloucestershire, Oxfordshire, Somerset and Wiltshire. Brunel wanted to improve their quarterly client reporting and fully automate and streamline the reporting process.

Brunel Pension Partnership undertook a thorough and disciplined procurement process for their client reporting solution. This involved researching the market for suitable suppliers and taking each provider through a highly detailed RFP process, as well as strict due diligence and client reference calls.

Brunel were looking for a supplier that would become a partner, and work with them to provide an outstanding service to their clients and internal teams.

“Opus Nebula demonstrated domain expertise from the outset, and their speed of response and attention to detail were equally impressive.”



Tim Dickson, Head of Client Relationships, Brunel.

Tim Dickson, Head of Client Relationship at Brunel, comments, “Finding a firm that can undertake all the technical elements, has a flexible reporting solution and is able to become a true partner with us was very important.”

Reporting as a Service was an ideal solution for Brunel, the powerful data ingestors take data from a number of sources including a third-party administrator, validates the data, and prepares it for reporting. This was a complex process, and was where **Opus Nebula demonstrated their skill and technical ability to complete the job.**

The opportunity was taken to redesign the reports utilising Opus Nebula's in-house designer to deliver improved layout and clearer communication to Brunel's clients. Stephen Taggart, Head of Reporting at Brunel, comments, “The redesign of the reports was very interesting, as well as ensuring the look and feel was **eye-catching and fresh.** The Opus Nebula team also ensured that specific data elements were displayed in the most appropriate manner, such that the communication to the audience was as efficient and effective as possible.” Stephen also noted, “Opus Nebula shared their

reporting best practices based on their **huge industry experience** in order to design and develop a set of world-class reports.”

The on-boarding project was managed via a joint project plan, with agreed steps, dependencies and milestones. Paul Gillis, Project Manager, remarked, “Opus Nebula's significant experience in on-boarding to their solution was evident, and their plans and other project collateral ensured the project was closely managed and highly efficient.”

Reporting as a Service provides a SaaS solution for the Brunel reporting team to manage and control the entire end-to-end reporting process. From data ingestion, data validation, through report scheduling, report production, review, approval and storage.

Investment commentary integrated into the final report is often an industry challenge, and Brunel had a highly specific requirement that required an upgrade to the core reporting solution so that it exactly matched their business process. Stephen Taggart commented, “The upgrade to the commentary process, was discussed, refined, agreed and delivered in a very short timeframe. **It was mightily impressive that Opus Nebula were able to respond so quickly and efficiently.**”

The flexibility of Reporting as a Service ensured that all the individual client reports are produced exactly as required and are fully automated. Additionally, the reporting solution provides control to the users, so they can manage and add content, reporting elements, pages and sections, very simply and as they require.

“We have identified and engaged with a true reporting partner in Opus Nebula and have a flexible model that provides us and our clients with world-class reports today and future-proofs our reporting going forward.”



Joe Webster, Chief Operating Officer, Brunel.



Reporting as a Service®

The Opus Nebula solution

We believe that investment firms should have access to the very best client reporting solution available to provide complete, accurate, timely and tailored reporting to their clients. But firms no longer need to build and host the system themselves.

Opus Nebula's **Reporting as a Service®** solution provides a complete end-to-end and pre-built client reporting solution to wealth and asset management firms, family offices and hedge funds. The cloud-based solution enables firms of all sizes including smaller and medium sized investment firms to provide world-class reporting to their clients in an efficient and affordable basis.

The Reporting as a Service solution integrates easily with multiple data sources and simple user dashboards control the report preparation, production and publication processes.

All completed reports and their full audit trail are automatically stored in the document library for future reference.

For more information about Opus Nebula, please visit: opus-nebula.com

About Brunel Pension Partnership

Brunel Pension Partnership is one of eight UK Local Government Pension Scheme pools, bringing together £35 billion of investments of ten like-minded funds: Avon, Buckinghamshire, Cornwall, Devon, Dorset, the Environment Agency, Gloucestershire, Oxfordshire, Somerset and Wiltshire.

Our priority is to manage our fiduciary duties to our clients. Our partnership also made major commitments on Responsible Investment and Climate Change, in line with our shared values.

Brunel Pension Partnership Limited is registered in England and Wales (company no. 10429110). Its registered office is at 5th Floor, 101 Victoria Street, Bristol, BS1 6PU. Authorised and regulated by the Financial Conduct Authority No. 790168.

To read more, please visit: brunelpensionpartnership.org

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Brunel Pension Partnership Limited has been set up to provide investment services to ten Local Government Pension Funds. It is not able to provide pension benefit administration services or deal with LGPS member queries. For enquires about a specific Pensions Fund, please contact the Fund directly.

