

CASE STUDY

Royal London Asset Management on-boarding to Reporting as a Service



Re-designing and fully automating
the Quarterly Investment Reports for
the Royal London Asset Management
Institutional and Wholesale businesses.



REPORTING AS A SERVICE®



Royal London Asset Management selected Opus Nebula to redesign their client and fund reports, and to on-board them to their SaaS reporting solution. Royal London Asset Management had a desire to improve the reports, automate the report production process and deliver the quarterly reports on time – every time.

Royal London Asset Management undertook a thorough and disciplined selection and procurement process for their new client and fund reporting solution. This involved researching the market for suitable suppliers and undertaking a detailed selection process, as well as strict due diligence.

“We signed a contract with Opus Nebula in January and were live with all our Quarterly Investment Reports by the end of June. It was a great achievement to deliver the project within 6 months and on scope, demonstrating how we worked successfully in partnership.”

Leigh Payton, Programme Manager,
Royal London Asset Management.

Royal London Asset Management were looking for a supplier that would become a trusted partner, and work with them to provide an outstanding service to their clients, investors and internal teams.

Paul Peristiane, Head of Reporting at Royal London Asset Management, comments, “We were specifically looking for a multi-tenant SaaS solution, in order to streamline the on-boarding process and minimise the internal project activities.” He goes on to say, **“Opus Nebula demonstrated domain expertise from the outset, and their speed of response and attention to detail were extremely impressive.”**

A complete redesign of the reports was undertaken within the on-boarding project, with pages and content designed and displayed specific to each client mandate or fund type. Jez Harris, Project Manager at Royal London Asset Management, comments, “The redesign of the reports was an important element for us to get right. As well as ensuring the look and feel was current, the Opus Nebula team also ensured that specific reporting elements were displayed to the audience in an efficient and effective way.”

Jez also noted, “Opus Nebula shared their reporting best practices based on their industry experience in order to design and develop a set of market leading reports that our reporting teams can simply manage and control.”

Jez Harris, Project Manager, remarked, “Opus Nebula’s significant experience in on-boarding to their solution was evident in that their plans and other project collateral ensured the project was closely managed, efficient, and delivered on time.”

Reporting as a Service provides a multi-tenanted SaaS solution for the Royal London Asset Management reporting teams to manage and control the entire end-to-end reporting process.

From data ingestion, data validation, through report scheduling, report production, review, approval and report storage.

Additionally, the reporting solution provides control to the users, so they can add content, reporting elements, pages and sections, very simply and exactly as they require.

Investment commentary integrated into the final report is often an industry challenge, and Royal London Asset Management had a very specific requirement in order to include mandate specific and highly personalised investment commentary in their reports. This requirement was simply accommodated by the flexible and powerful commentary process.

These elements combine to ensure that all the individual client and fund reports are produced exactly as required, and the production is fully automated.

“Opus Nebula shared their reporting best practices based on their industry experience in order to design and develop a set of market leading reports that our reporting teams can simply manage and control.”

Jez Harris, Project Manager,
Royal London Asset Management.

“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”, says Paul Peristiane, Head of Reporting. He goes on to say, “After the huge success of this initial phase, we are pressing ahead with our other planned phases so that the benefits and efficiencies are further magnified.



Reporting as a Service®

Opus Nebula multi-tenant SaaS reporting 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 **SaaS solution** provides a complete end-to-end and pre-built client reporting solution for wealth and asset management firms, family offices, asset servicers and pension schemes. The cloud-based solution enables firms of all sizes to provide world-class reporting to their clients in an efficient and affordable basis.

The Reporting as a Service solution integrates easily with golden 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 Royal London Asset Management

Established in 1988, Royal London Asset Management is one of the UK's leading fund management companies, providing investment management solutions to both wholesale and institutional clients such as not-for-profit organisations, local authorities, and the insurance sector.

Royal London Asset Management manages £154.8 billion of assets as at 30 September 2023. It invests in all major asset classes including UK and overseas equities, government bonds, investment grade and high yield corporate bonds, property, and cash.

Royal London Asset Management Limited is authorised and regulated by the Financial Conduct Authority. Registered Office: 80 Fenchurch Street, London, EC3N 2ER.

Visit rlam.com to learn more.

For press releases about Royal London Asset Management, please click [here](#).