

# PIONEER INVESTMENTS

› Leading global investment management firm celebrates ten years of successful client reporting with Vermilion.



## CHALLENGE

Automation of reporting to support a fast-growing institutional business. End users are client reporting teams, IT analysts, and other staff in Boston, Dublin, and London.

## SOLUTION

One instance of Vermilion Reporting Suite, utilized globally as a truly enterprise-wide client reporting solution.

## RESULTS

Benefits include high quality client reports, with consistent branding and data accuracy, plus the ability to scale.

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## About

Founded in Boston in 1928, Pioneer Investments is a global investment management firm with more than 2,000 employees in 28 countries and over \$240 billion in assets under management as of December 31, 2016.

Pioneer Investments offers a diverse range of products across both traditional and non-traditional asset classes to clients that include institutions, corporations, intermediaries, and private investors around the world. The firm has three Global Investment Centers in Boston, Dublin, and London.

“Vermilion Reporting Suite has enabled our team to manage a constantly increasing client list and meet their demands with trusted data.”

#### Goals

Pioneer Investments has experienced continued growth in its institutional business. A client reporting platform was required that could be rolled out for client reporting hubs globally. Key requirements included the need to support data collection from numerous source data systems, provide consistent branding, and allow for a high level of client customization. A scalable platform was required, with the ability to manage the data collection process seamlessly and allow for validation of data sources.

#### Approach

In May 2005, a global project team was established to address these concerns. After digesting detailed RFP responses, workshops, and proof of concepts with a number of vendors in the market, Pioneer Investments selected Vermilion Software as its global solution provider for client reporting. Pioneer Investments commenced the rollout of Vermilion Reporting Suite shortly after the RFP process, in January 2006.



#### Results

Pioneer Investments has installed one instance of Vermilion Reporting Suite, utilized globally as a truly enterprise-wide client reporting solution.

Vermilion enabled Pioneer Investments to streamline its entire reporting operation. Data validity and accuracy are assured as the collection from source is now automated and trusted. Calculation checks are performed as well as cross-validation of data sources.

Even branding is reinforced by the delivery of consistent and globally accessible reporting templates, with significantly improved output presentation. This is further complemented by the availability of multilingual features that suit a global client base.

“Vermilion Reporting Suite is both scalable and flexible, incorporating a comprehensive workflow facility. The product is intuitive and endeavors to address every issue faced in client reporting: data, branding, commentary management, workflow, translations and reusable libraries of styles, data connectors, and components. Furthermore, Vermilion’s consultants demonstrated an excellent understanding of our environment and have many years’ experience in institutional client reporting,” said Christine Griffin, Vice President, Global Applications Manager at Pioneer.

Vermilion consultants were deployed for the initial implementations between 2006 and 2008. Since then Pioneer Investments has been self-sufficient, with responsibility for upgrades, additional implementations, and report or data feed developments that have further leveraged the solution.

“Automation is the key to sustaining a scalable client reporting infrastructure. Vermilion Reporting Suite has enabled our team to manage a constantly increasing client list and meet their demands with trusted data,” said Anne Pataky, Senior Vice President, Global Head of RFPs at Pioneer.

