

ARCHER SERVICE DIAMONDS

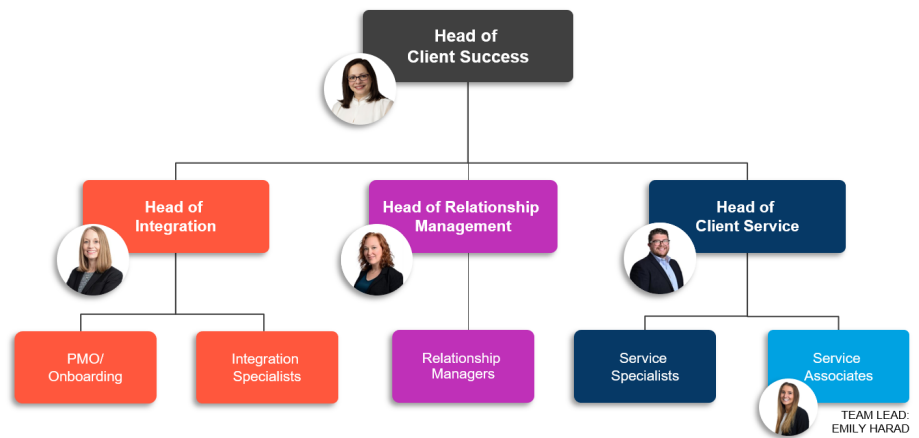
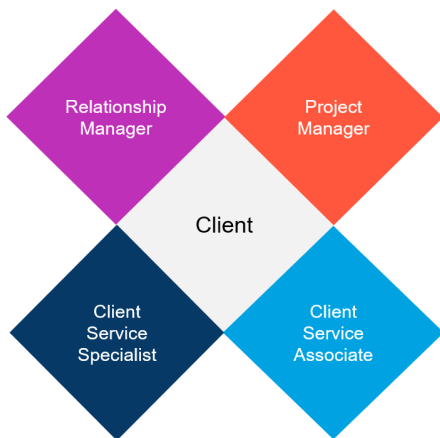
Asset managers working with Archer benefit from a dedicated team, or Service Diamond, that they can reach out to with questions that need to be answered quickly and completely. Service Diamonds cover other asset managers with similar business models, which means teams are experts in their specific business, allowing for shared best practices and accelerated response times.



ARCHER SERVICE DIAMONDS

Service Diamonds include a Relationship Manager, Project Manager, Client Service Specialist and Client Service Associate.

- **Relationship Managers** act as strategic partners, and assist with launching new investment strategies, adding sponsors/platforms, and anything related to enabling our clients' growth.
- **Project Managers** orchestrate Archer's proven implementation workflow and keep all projects on task and deliverables on time.
- **Client Service** roles act as tactical partners, solving day-to-day problems, providing additional education, training, and BAU escalations.



Each diamond is made up of professionals with an average of 15 years of industry experience, who work across Archer business lines and specialize in Retail, Institutional, Multi-Channel, and Private Wealth clients, respectively. Some benefits of this structure include:

- Establishment of familiar approaches and streamlined communication
- Guaranteed built in coverage and support
- Honed expertise and knowledge of the industry and marketplace
- Insights and best practices are leveraged across similar asset managers
- Ensures maximum impact of Service Delivery specialists

case study

ARCHER'S SERVICE DIAMONDS IN ACTION

Here is how Archer's differentiated service model helped meet the needs of an established asset manager who was looking for a comprehensive outsourcing solution.

The Challenge

The manager's previous service provider's approach was to support each product and business line with a separate service team, which led to a fragmented service experience and lacked the benefit of shared knowledge and best practices.

The client's operations team was unclear where to go for questions or issues, and were often passed between support personnel, requiring multiple follow ups. Without the proper organization of resources or a system to track their inquiry to conclusion, their requests took longer than expected and they were frequently unable to meet their deadlines.

Archer's Solution

With Archer's Service Diamonds, the asset manager's operations team was able to quickly establish a cadence of communication with their Archer team. Several months in, when the manager had an expedited request, the Archer team was able to manage it quickly and efficiently. The manager was looking to set up a large client on a sponsor platform for dual contract retail SMA, a process that generally takes 4-6 weeks and involvement from representatives on Archer's Relationship Management, Client Service, Integrations, Technology, Account Services, Trading, Operations and Reconciliation teams.

The teams dove into their well-honed collaborative processes for preparing account profiles, establishing connectivity to sponsor reconciliation feeds, obtaining sponsor system access for multiple Archer teams, and defining new accounts, trading, and reconciliation procedures. Within two weeks, Archer was ready to go live.

Throughout the process, the Operations and Compliance teams often had detailed process questions. Because members of the Service Diamonds work across functional areas within Archer, they were able to easily do the leg work of researching questions and reporting back to the client.



For more information on Archer's Client Experience, please reach out to your Account Executive or Relationship Manager.