



STRATEGIC TECHNOLOGY ALIGNMENT BLUEPRINT CASE STUDY

TRILOGY GLOBAL ADVISORS

COMPANY OVERVIEW

Trilogy Global Advisors is an independent investment management advisory firm headquartered in New York. The company manages worldwide assets for institutional and retail clients using a unique risk-management approach to growth-oriented investment.

THE CHALLENGE

Faced with growing business, Trilogy Global Advisors recognized the need to upgrade its key support system to handle increased trading volumes and new market opportunities.

The company's proprietary portfolio, performance and risk management technology platform had reached the limits of its capabilities, affecting daily operations and inhibiting business growth plans.

Senior management required a practical, affordable and effective IT strategy to meet short-term operational demands and provide longer-term flexibility.

THE SOLUTION

Trilogy Global Advisors engaged TwoFour Consulting as trusted advisors to define a comprehensive Strategic Technology Alignment Blueprint aimed at upgrading its primary internal support system.

TwoFour Consulting worked closely with Trilogy Global Advisors to identify the implications of continued business growth, and to define specific measures to reduce operational risk, improve technology and data integrity, and increase organizational stability.

Through a series of facilitated workshops, interviews and hands-on research, TwoFour Consulting analyzed the company's business needs and existing software platform in detail, evaluated current operational practices, and identified key underlying technology, process, and organizational bottlenecks.

COMPANY PROFILE

Trilogy Global Advisors

Independent investment advisory firm providing global asset management services

CHALLENGE

Define a comprehensive business-led strategy for upgrading a key internal support system to cost-effectively meet immediate operational needs and support longer-term business development

SOLUTION

Short-term upgrade of an existing support system to minimize operational risk and improve daily performance, and a longer-term evaluation of packaged solutions to phase out current software

BENEFITS

- Economically feasible approach to stabilize operations in the short-term
- Achievable plan to phase in new technology, organizational practices and processes aimed at reducing overall risk
- Cost-effective upgrade of support system to handle asset management growth from USD 6 billion to USD 12 billion
- Longer-term approach to minimize technology maintenance overhead and reliance on outdated software

STRATEGIC TECHNOLOGY ALIGNMENT BLUEPRINT CASE STUDY

As a result, TwoFour recommended a two-pronged business-driven strategy. First, quickly stabilize the current system to make it more reliable and robust, and remove barriers to smooth daily operations. Second, prepare for longer-term business growth by evaluating potential packaged solutions to replace legacy software.

THE BENEFITS

The recommended strategy has proven practical and effective. Following the Strategic Technology Alignment Blueprint engagement, Trilogy Global Advisors again worked with TwoFour Consulting to fix the high priority system problems identified and stabilize key areas of functionality. The upgraded technology platform has continued to successfully support ongoing business expansion. Since completing this strategy, Trilogy Global Advisors has more than doubled the assets under its management to USD 12 billion.

Because system stabilization was only a short-term measure, Trilogy Global Advisors is also in the process of implementing a third-party packaged software solution to ultimately replace its original, proprietary solution. Use of the old system will be phased out – with the exception of its unique risk and performance management algorithms – thus reducing reliance on the outdated and expensive-to-maintain software.

TwoFour Consulting's recommended approach was both economically feasible and compatible with the company's overall ambitions. The business-led strategy has enabled Trilogy Global Advisors to cost-effectively maximize operational productivity, while significantly reducing the risk their original platform represented, both in the short-term and the future.



“TwoFour Consulting were extremely strategic in helping us define a tangible and realistic approach. They really understood our business, what we were trying to accomplish, and provided the outside perspective necessary to jumpstart our decision-making process. TwoFour knows technology and they know the industry, and are able to bridge the gap between the two.”

Carol Holley

**Chief Operating Officer,
Trilogy Global Solutions**

ABOUT TWOFOUR

TwoFour provides technology-enabled business solutions to leaders in the financial services industry. Headquartered in New York, TwoFour is a privately held professional services and development company that has enjoyed continuous growth and profitability. We are committed to:

- Delivering innovative solutions that solve our clients' most pressing problems;
- Anticipating and preparing clients for the impact of future industry dynamics on their business; and
- Acting as a strategic partner to leaders in the financial services industry, offering cutting edge, value-added counsel and services.

CONTACT

WHITE PLAINS:

445 HAMILTON AVENUE
WHITE PLAINS, NY 10601
PHONE: +1 (914) 220-8800

CONSULTING@TWOFOUR.COM

NEW YORK CITY:

245 PARK AVENUE
NEW YORK, NY 10017
PHONE: +1 (212) 724-3920

LONDON:

148 LEADENHALL STREET
LONDON, EC3V 4QT
PHONE: +44 (0) 20 3177 0040