

# CLIENT CASE STUDY

## Profile

**Client:** Clearbrook Investment Consulting

**Description:** Consultants to institutional and individual investors on investment strategies and manager selection.

**Assets Advised:** \$30 billion

## Background

- ▶ Firm performs due diligence on investment managers on behalf of institutional clients.
- ▶ Needed a system to consolidate data on managers, link the data to their clients, and provide the ability to screen and filter information.
- ▶ Needed a means of preserving proprietary intelligence in the event individuals left the firm.

## Solution

Advent Tamale RMS:

- ▶ The original research management solution.
- ▶ Provides a centralized repository for capturing and organizing research data.
- ▶ Configurable and customizable to support unique workflows and business objectives.

“Tamale links the investment managers to our clients, so that we are able to view the exposure of a particular manager across our clientele at a moment’s notice.”

Sheila Lamb, *Consultant, Clearbrook Investment Consulting*

## Tamale RMS® Gives Clearbrook a Clear View of Investment Managers

Clearbrook Investment Consulting advises institutional clients on their investment strategies, then identifies investment managers best qualified to meet their clients’ objectives. That requires maintaining current, in-depth information and evaluations on nearly 600 managers.

“We were using our company file server and creating directories of managers by asset class,” recalls Dean Armstrong, a managing director at Clearbrook. “As our business grew, we outgrew that system.”

Adds Clearbrook consultant Sheila Lamb, “What we needed was a system to house all of our intelligence—quite frankly, so that if someone left the firm, the intelligence didn’t leave with that person.”

## Tamale: Pulling it All Together

Advent’s Tamale RMS, the pioneering research management solution, now provides a central repository for all the research Clearbrook collects and generates among its four offices. Just as investment managers use Tamale to organize research around securities, consultants like Clearbrook can use it to organize data on managers.


“Our day-to-day business is researching investment managers, tracking them, picking best of breed across different asset classes and performing considerable analysis on them to determine if they’re suitable for our clients,” Ms. Lamb explains. “We have nearly 600 managers that we currently track, all of which we have now loaded into our Tamale database.”


And unlike Advent’s Tamale clients that use the system for investment security research and company analysis, Clearbrook had some unique requirements for doing research on managers. Advent worked with Clearbrook to create a custom template and filter to meet their specific needs.



## Benefits

- ▶ Allows instant access to all information on a particular investment manager.
- ▶ Streamlines manager oversight and due diligence
- ▶ Eliminates the need to search email and hard drives for records of conversations and correspondence.
- ▶ Enables a firm to monitor analysts' workloads and progress.
- ▶ Facilitates sharing of data among multiple offices as well as on the road.

 **"We have information coming in from all different sources—periodicals, investment firms, research firms. With Tamale it's very easy to put it all in one spot so everybody can find it easily."**

 **"A robust tool like Tamale would be valuable to any manager and would certainly be a positive factor in our decision to work with that manager."**



Find out more:  
[www.advent.com/tamale](http://www.advent.com/tamale)



ADVENT®

## Delivering Immediate Answers

Tamale gives our consultants a dashboard of information on each portfolio manager at a moment's notice.

"One of our senior consultants was recently on the phone with a client who was asking about a certain manager," Ms. Lamb recounts. "With just a few keystrokes in Tamale, the consultant was able to pull up all the information on that manager—when we last met with that manager, our analyses, recent events—so that he was able to quickly summarize thoughts on that manager to his clients."

"Previously that would have taken a long time to piece together," Mr. Armstrong adds. "We'd have to go into Outlook and pull conversations, go into the file server and find meeting notes. Tamale basically pulls all these things into one spot."

## Tracking Trends, Monitoring Workloads

Clearbrook also uses Tamale for a library of topical economic information and news pertinent to its clients. "We have reams of information coming in from all different sources," Mr. Armstrong says. "Periodicals, investment firms, research firms—with Tamale it's very easy to put it all in one spot so everybody can find it easily."

"We also use it to monitor our analysts' progress," Ms. Lamb notes. "At our Monday morning meeting, we might pull up Tamale on the large screen and look at all the analysts. Maybe we'll see an analyst that has one or two entries in Tamale, where others have 30 for the week. It's a valuable tool for balancing the workloads."

Clearbrook's due diligence process includes the analysis of portfolio managers' investment tools. "A robust tool like Tamale would be valuable to any manager and would certainly be a positive factor in our decision to work with that manager," Mr. Armstrong says.

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