

A Case Study with:



Conifer
Financial
Services

“The ultimate goal is that all the systems have been checked overnight and are ready by the time clients arrive in the morning.”

Manish Garg

Director, Information Technology
The Conifer Group, LLC

“The relationship is fostering and we are looking to Empaxis for many things that we don’t necessarily need to do internally.”

Conifer Financial Services is a leading provider of fund administration, middle-office, trading, and prime brokerage services to many hedge funds and investment management clients

The Conifer Group (Conifer) sought to ensure 100 percent systems availability on a global basis through outsourcing overnight systems monitoring and event escalation for the 15 systems across the firm’s platform infrastructure. The project objectives were:

- To ensure that Conifer provides a smooth market-open for its clients
- To avoid adding full-time staff to address overnight needs
- To minimize costs associated with service delivery
- To leverage third-party monitoring as a quality control function

Empaxis was selected over hiring staff due to:

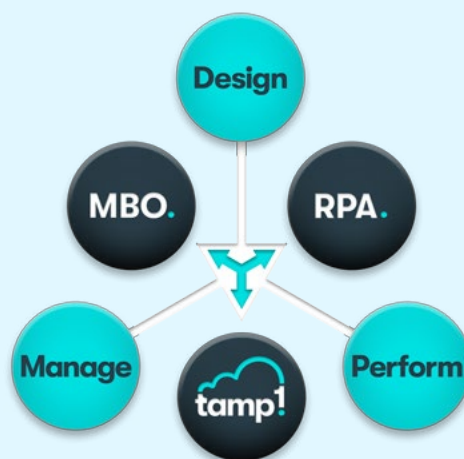
- The proven capability to satisfy overnight monitoring, event escalation and reporting for 15 systems running in the firm’s platform environment
- The implementation of highly prescribed systems monitoring incorporating an alert process and procedure
- The delivery of independent, third-party credibility to the function of systems monitoring
- The provision of quality systems support on an overnight basis at a lower cost point than adding staff

"In addition to systems monitoring, we're working with Empaxis to build tools that standardize other processes, for example ETL for application migrations and onboarding."

Manish Garg

Middle- and Back-Office Outsourcing

Within a month, Empaxis formed a highly structured process for systems monitoring and escalation. This enabled Conifer to have a high level of visibility into the status of client systems upon staff arrival to the office, ahead of market open. Empaxis quickly and efficiently notifies all relevant parties in the event an issue needs escalation. The issue is quickly addressed and resolved with little or no disruption for the client.



Empaxis employed its trusted method to ensure the most efficient and effective solution for Conifer. Firstly, the solution was designed according to the specific needs and opportunities. The solution is performed 24 x 7 x 365. It is managed over time to ensure an optimum service.

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Results for Conifer:

- Implementation and execution of a highly prescribed systems' monitoring and escalation process and procedure for 15 systems running within Conifer's platform environment
- Overnight monitoring and reporting service executed by a highly experienced India-based Support Desk comprising back-office specialists
- A complete solution at a fraction of the cost of hiring internal staff

Founded in 2004, Empaxis was the first middle- and back-office outsourcing company designed to deliver offshore labor exclusively to asset managers, hedge funds, and wealth managers. After nearly two decades, the team remains fiercely focused: we live and breathe operations, so that you can focus on portfolio and investment management.

For more information please visit: **www.empaxis.com**