

# CASE STUDY

## STANDISH MANAGEMENT

**Standish Management, LLC, a provider of specialized fund administration services for Managers and General Partners of Buyout, Venture Capital, Real Estate and Fund-of-Funds private equity funds, specializes in helping its GP clients scale rapidly; by minimizing distractions and helping them cut expenses, clients are able to focus on investing in their portfolios. Because of this, Standish was seeking a technology platform that would provide them with a turnkey solution.**

### SITUATION

Standish Management's steady and rapid growth has seen them evolve into a firm that administers over 1,200 entities and reports to more than 25,000 LPs, amounting to over \$100 billion in committed capital under administration.

The firm's success led them quickly out of the Excel spreadsheets and QuickBooks stage, in search of a solution that could help them scale their business swiftly and smoothly, and better serve clients who required solutions such as a CRM and a true General Ledger. Moreover, Standish wanted a technology provider who could scale up with them, and one that could provide a one-stop shop experience. Standish also wanted to offer clients both fund administration outsourcing and co-sourcing options, to provide them with bespoke services that best fit each client's situation.

Standish embarked upon an effort to find a solution that fulfilled their technology needs and allowed them to offer clients the flexibility and superior service that are signature to the firm.

### SOLUTION

Ultimately, Standish sought a provider who could not only work with them in partnership, but one who could match their pace of expansion. It was then that Standish turned to Allvue Systems, seeing an opportunity to grow in tandem with a fast-moving technology company. Allvue's cloud-based capabilities provided Standish with solutions that were critical to its desire for front-to-back operations:

- A complete back office solution with a true GL, reporting and workflow standards
- Corporate Accounting capabilities customized to GPs
- Data visualization tools that spot trends across portfolio companies and deal pipeline
- A communications portal to help IR and Deal Teams track prospects, investors, and deal opportunities
- Customizable GP client portal with self-service dashboards



According to Susan Gillick, President at Standish Management, LLC, "We love the idea of building successful partnerships, and want to be flexible in terms of the products we offer to our clients. A GP or CFO standing up a new fund has a lot to think about, so if they have concerns about assembling technology products from multiple vendors to maintain essential fund operations, this takes away from their core competencies. At Standish, our goal is to provide them with a seamless, customized experience that responds to their needs, and that's why we chose Allvue's solution set. With Allvue, we're able to quickly and easily meet their needs and requests in a bespoke way, and really help support their success."

## ABOUT ALLVUE

Allvue is a leading provider of investment management solutions for fund managers, investors, and administrators in the alternative investments industry. We offer innovative, configurable investment software that eliminates the barriers between systems, information, and people, optimizing decision making and streamlining processes to meet investor needs across private debt, private equity, and other alternative asset classes.

## SCHEDULE A DEMO

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**ALLVUESYSTEMS.COM**

## BENEFITS

The move to Allvue's solution set for its Manager and General Partner clients has helped Standish concentrate on its core expertise, while continually enhancing the quality and individualization of its service. By offering both co-sourcing and outsourcing options for their fund administration services, Standish is able to support their clients in the way that is best for them, including 12 clients currently using the co-sourcing model. Using Allvue, Standish Management was able to:

- Deliver a full one-stop solution that helps the business scale and meets client needs
- Leverage a complete back office solution with a true GL and detailed reporting
- Utilize a full set of corporate accounting tools for their Manager and GP clients
- Visualize industry trends across their portfolio companies and act on them
- Draw on an effective communications platform and CRM capability to track prospects, investors, and deal opportunities
- Leverage highly configurable, feature-rich dashboards and securely share documents via an investor portal

With Allvue's Fund Administration solution set, Standish can focus on growing its business, while providing its clients with a customized, all-in-one solution set that responds to their evolving challenges.