CloverDX

How Ortec Finance reduced repetitive manual data processes by up to 90% with CloverDX

Use case

- Automating time-consuming, repetitive manual report preparation in Excel
- Making data processes more transparent, for better collaboration and easier troubleshooting

Thomas Hage
Senior Consultant

"We're a small team but we can actually cover quite a lot of ground"

"We hit a ceiling. If we wanted to grow in capacity and revenue, we would need to hire another person to do the same thing, so it was not very scalable."

Opportunity for change

- Consultants were spending days preparing complex reports every quarter
- Work was repetitive, time-consuming and error prone
- People were under increasing stress every quarter as report deadlines approached
- Unable to scale due to manual work required for each new client

"It's really the click of a button and we run the system. Instead of having typically a 4 or 5 day process of people preparing the data, running the models, checking the results and building the reports to send to the clients, we've reduced that to half a day or less."

Results from automating processes with CloverDX

- Processes that used to take 4 or 5 days a quarter are **now reduced to half a day** or less
- Reducing labor-intensive manual data tasks has **eliminated end-of-quarter stress**
- Visual interface for data workflows has enabled less-technical teams to take on some of the work, **freeing up developer time**
- Automated error-handling and monitoring means any **issues are faster to find and fix**, also saving significant time and improving accuracy
- New market opportunities opened by increasing reporting capacity, making it easier to **grow the company**

Client: Ortec Finance

Ortec Finance is a leading global provider of technology and solutions for risk and return management. They have over 500 clients in more than 20 countries, and help them face the growing complexity of investment decision making through designing, building and delivering high-quality financial software models.

CloverDX + **ORTEC FINANCE**