MACKEYRMS

From Old to New

It's Time to Modernize Your Research Management Process.

Research management remains a puzzling state of affairs for institutional investors in 2020. All over the world, asset managers rely on antiquated, slow, and inefficient platforms—with no plans for an upgrade.

The investment enterprise devotes significant resources modernizing the way firms interact with markets, counterparties, regulators and investors.

Yet, the systems supporting teams charged with finding the right investment ideas—the very lifeblood of the active manager—remain shockingly outdated and hard to use.

Why not fix what's so clearly broken?

Unfortunately, due to bad experiences with painful systems change, and a general feeling of being underwhelmed by older research management software, some firms assume switching to a new platform will be more trouble than it's worth. **They think the process will be difficult, frustrating and time-consuming.**

This misconception is costing investment teams hundreds of hours in lost productivity across the enterprise. It leads to morale-lowering frustrations among analysts as they slog through their workloads reliant on outdated and inefficient technology. **And ultimately, it can prevent or delay the team's best ideas from getting into the portfolio.**

Change Doesn't Have to be Painful.

The reality is it's much easier to improve your research process and eliminate inefficient and unhealthy work processes with the right partner.

Here's what migrating from old to new looks like with Mackey: simple, seamless, and 100 percent executed by us, working in close coordination with your team.

If you haven't viewed our **90-second video** on our process, take a moment to **view it now.**

Our team is battle-tested, having migrated leading investment managers from legacy research management platforms, other modern providers, internally built systems, Outlook, SharePoint, shared drives, Evernote, Lotus Notes, OneNote, and a wide variety of other third-party applications.

We've handled small migrations and tackled major cutovers with hundreds of users and terabytes of data. Whether you're sitting on decades of investment research or just getting started, Mackey is a proven partner to assist with your modernization initiative. No matter your current system, odds are we've already helped one of your peers migrate away from it. **We've also engineered our platform to make migration easy.** Migrating customers need only send a single communication requesting their data from their current provider.

We handle the rest.

To dig a little deeper into the process, here's a breakdown of project tasks for investment teams that switch to Mackey.

Customer To-Do List

STEP 1

Contact your current provider to request your firm's historical research content.

To make this step even simpler, we provide the exact technical language to use in the request.

STEP 2

There is no Step 2.

After Step 1, the onus for completing your migration is on us.

Mackey To-Do List

STEP 1

Receive and transfer the data to a secure location.
We conform to all firm policies, whether that's an upload to a secure fileserver or an in-person exchange.

STEP 2

Process, decipher and inspect all data and file structure.

STEP 3

Validate the integrity of the data by ensuring all historical data is present and legitimate.

STEP 4

Complete MD5, file and database crosschecks to reconfirm data is accounted for.

STEP 5

Import legacy software data into the Mackey database, creating notes, tags, and handling for all your file attachments.

STEP 6

Ensure all styling, content, properties, and markup from the original system are kept intact within Mackey.

STEP 7

Identify and overcome limitations and/or exclusions of legacy vendor extract tools, including unlocking and sequencing versioned documents, embedded image handling, and title reconciliation.

STEP 8

Submit migration hierarchy for customer review and approval.

STEP 9

Initiate and finalize migration.

This process is conducted in coordination with internal technology teams while investment teams continue to work uninterrupted. And once migration is complete, your team will enjoy on day one all the productivity and collaboration benefits that a modern research management platform delivers.

That's the Mackey guarantee.

It's time to empower your team and pave the way for improved productivity, tighter collaboration and increased efficiency and control you're your investment process.

Ready to make the switch?
Contact us today to get started.

Need more information?
Ask us to share a customized technical document outlining your migration to Mackey.

About MackeyRMS

MackeyRMS is a provider of a SaaS-delivered research management platform engineered to optimize the way analysts and portfolio managers generate, share, debate and act on investment research conducted for actively managed portfolios. Relied upon as a single system of record for research supporting the investment process, MackeyRMS is used by many of the world's leading asset management firms to organize key investment workflows, engender trust from investors, and streamline regulatory and compliance oversight. MackeyRMS is used by clients across the Americas, EMEA and APAC regions representing more than $2.5 trillion in AUM.