



LAKEFRONTDATA CONSULTING

LakeFrontData Consulting is a specialist firm of industry-leading data management experts providing unbiased, objective and trusted advice, focused on all facets of enterprise data management (EDM) including strategy, technology, product management, and implementation services. Our team of professionals provides a broad range of data know-how based on real-life experience serving in senior management and operational positions.

LakeFrontData believes that data management is currently serviced by a fragmented and rapidly evolving marketplace characterized by over one hundred global software / solution vendors selling specialized and proprietary products and services. Financial institutions need, and can benefit from, trusted independent advice from experts that have a view of the big picture and are able to provide a strategic road map and implementation plan on how it all fits together to achieve the financial institutions' goals.

Data management is not purely a technology or operational issue, data is a corporate asset and information is the life-blood of financial services. The promise of data management lies in achieving a more holistic vision. This requires a firm to focus on, and improve, all aspects of their data infrastructure, including technology, software, data feeds, data flows, workflow, governance, process, quality improvement and so on. If data management is strategically addressed at a division or enterprise level, key business benefits (e.g. increased revenue, risk mitigation, cost reduction and regulatory readiness) can be realized.

CONSULTING SERVICES

LakeFrontData's trusted data management consulting services incorporate advisory, consulting, premier industry thought leadership, subject matter experts, solutions, strategic advice and independent opinion.

LakeFrontData's consulting service areas include:

1. Management Consulting & Advisory Services
2. Integration & Technology Consulting
3. Project Management and Supplemental Staffing

Consulting Practice Areas include:

- EDM Capability Assessments, including projects, technology, operations and governance
- Data Management Vendor Solutions (Software, Content, etc.)
- Managed Data Services Strategy
- Architecture / Data Models
- Governance, Operating Models and Organizational Structure



LakeFront is focused on helping financial institutions, exchanges and content and software vendors deal with their Enterprise Data Management challenges from both a top-down (strategy, vision, road-map, policy and competitive advantage) and bottom-up (content, vendors, workflow, quality and technology) viewpoint. Our team of consultants combines industry experience with proven strategic frameworks to provide clients with rational, practical and implementation-ready services to allow you to achieve short term business goals and overall long term strategy.

RECENT PROJECTS:

- Assessment of current enterprise data management technology state to meet emerging new business needs for reference and pricing data. Recommendations & deliverables included the design & implementation of a Data Management Office (DMO), a security master data architecture and a core foundation data platform utilizing a new generation of SOA-based technology platform
- Evaluation of data management capabilities of a major pension plan across technology, business agility and organization structure. Deliverables included a detailed Enterprise Data program roadmap, temporary on-site EDM leadership, creation of a DMO (with job descriptions), technology roadmap for future and assistance with implementation / project management of a new generation of technology platform, supported by build vs. buy analysis
- Advisor to a primary consulting firm establishing a new offering as a global vendor of managed data services. LakeFront provided business analysis, product management, executive advisory and hands-on assistance with strategy, analysis, project execution
- Assessment of Managed Risk Data Services and development of new products and services
- Overall EIM/enterprise data management strategy for a major Wall Street investment bank across all divisions. LakeFront provided vision, business alignment strategy, roadmap, product management, data management approach, various business cases, numerous business analysis sub-projects, workflow documentation and detailed enterprise system mapping.
- Investigation of models for a “data business” that would grow revenues and/or provide other strategic benefit to a major transaction services utility. Assessed viability of the opportunities and proposed a business roadmap to monetize opportunities
- Evaluation of Managed Data Services vendors/providers for a U.S. based asset management firm, using a framework and criteria that was summarized and categorized to highlight strengths and weaknesses of the MDS providers ranked to support the selection process.

MANAGEMENT CONSULTING AND ADVISORY SERVICES

Our team of consultants combines industry experience with proven strategic frameworks to provide clients with rational, practical and implementation-ready services. With experience across the enterprise data management spectrum, we provide the expertise and support to allow you to achieve short term business goals and overall long term strategy.

From strategic direction to project execution, Lakefront’s management consulting practice focuses on the financial services industry - leveraging our prior experience while staying current



with the changing data management landscape and the underlying technological, regulatory and business environment.

Specifically, we are committed to helping clients in the area of:

- Data Management Office (DMO), a services oriented business driven corporate data strategy to help formulate and guide a firm's data management strategy, governance, policy and product management.
- Vendor Selection and Analysis – Evaluating and recommending technology, content and managed service solutions for data management
- Business Development - develop strategies to address market and business requirements for increasing sales and market penetration
- Product/Service Development - determine functionality and execution plans to launch commercial and/or in-house products and services
- Process and System Improvements for improving data quality, reducing risk, promoting efficiency and maximizing the benefit via data management strategy and best practices that optimize processes and workflow; including current state assessments and gap analysis.
- Business Case Development and Analysis – Buy vs. Build analysis; EDM project justification
- Data Management Assessments - Identify and implement an effective data management policy including analyzing current data inventory to identify and eliminate unnecessary products and services.
- Reference Data Management
 - Domain expertise in all asset classes including equities, fixed income and derivatives
 - Process evaluation and strategy recommendations related to data sourcing, consolidation, cleansing, and exception processing
 - Data modeling and field mapping for securities data
 - Advice and use of model driven architecture tools
 - Data quality enhancements via process and systems improvements
- Third Party Vendor Analysis and Comparison
 - Management of RFI/RFP processes
 - Identify and recommend new or replacement technology, products and services
 - Data Management Platform evaluation of build, buy or custom solutions
 - Data Vendor analysis - Evaluation and selection of data vendor content, including conversion support efforts.
 - Managed Data Service Vendor analysis – Evaluation and selection of vendors to provide managed data services for clients.



- Technology Support
 - Provide component software for data feed loading and translation
 - Develop and support custom software for data feeds
 - Establish data models and requirements

INTEGRATION & TECHNOLOGY CONSULTING

LakeFront consultants are well-versed in translating business and client needs into functional, technical specifications and software. Our clients look to us for the following technology consulting services:

- Technology Strategy & Architecture - Advising how to maximize the benefits of data management technology, with specific focus on SOA – Services Oriented Architecture
- Data Management Software Specifications development for both functional and technical solutions that address data flows, workflow, data quality and distribution
- Data Modeling expertise and advisory services to help evaluate and select data model solutions for a broad range of asset types.
- Technology Support and software development for data feeds and vendor product integration and development of SOA 'services'

PROJECT MANAGEMENT AND SUPPLEMENTAL STAFFING

- Project Office Services
- System Implementation and Development
- Software Development Project Management
- Vendor Product and Back-Office Conversions
- Staffing - temporary data professionals for project startup, project peaks and staff augmentation

FOR MORE INFORMATION, CONTACT

LakeFrontData understands the data management marketplace and the drivers that financial institutions are faced with addressing. Whether it is a need to increase revenue, mitigate risk, reduce costs or adhere to the latest regulatory requirement, we are a trusted advisor for enterprise data management.

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