

## ATC'S INFORMATION TECHNOLOGY ASSESSMENT SERVICES

Is your Fund Office seeking to capitalize on technology expenditures and or increase the return on their information technology (IT) investments while making informed, objective decisions that are aligned with your business goals, and strategies?

The Segal Company's Administration and Technology Consulting (ATC) Practice conducts IT Assessments that have enabled Fund Offices/Organizations to restructure their IT operations to meet the challenges of today's technology.

### Our Process

Segal's comprehensive IT assessments evaluate the following areas:

- **Hardware**—infrastructure, networks and platforms,
- **Software**—technical and functional capabilities,
- **Management**—strategic planning, budgeting process,
- **Security**—data security, disaster recovery and system backups,
- **Documentation**—IT Policies and Procedures,
- **Operations**—IT support and Helpdesk, staffing and resources, vendor management and call center capabilities
- **IT Initiatives**—"Green" computing, virtualization, etc.

In addition, our assessment will examine how effectively the existing IT infrastructure and systems support the operational and transactional needs of the Fund Office by gathering the answers to the following questions:

- What functions and transactions are outsourced and why?
- Can the existing technology perform those outsourced transactions in-house?
- What types of enhancements are needed to create more efficiencies and reduce expenses?
- Conversely, what functions and transactions are performed in-house and how automated are they? What are the associated costs?



Upon completion of the assessment, we provide a report summarizing our findings, recommendations and next steps. Our analysis and recommendations take into account the Fund's unique environment as well as industry best practices.

When implemented, our recommendations will typically allow Funds to:

- Reduce or minimize existing IT expenditures;
- Make educated decisions regarding future technology changes and purchases; and
- Reduce or minimize IT related risks and exposure

### Our Approach

ATC assists Fund Offices of all sizes in achieving their IT initiatives through a thorough IT assessment. Utilizing a proven, business-driven methodology, our IT assessments provide valuable insights that could help maximize the return on your IT related investments and meet your business goals and objectives.

Our IT Assessments take a complete look at all aspects of IT within the context of the Fund's unique operational environment. Our assessments provide a full scale review of your existing IT environment including hardware, software, networking, data security, policies and procedures, staffing, expenditures, etc., and how well it supports operational efficiencies, productivity and work processes, as well as its scalability and flexibility to accommodate future growth and potential regulatory changes.

### Our Experience

IT assessments are performed by our team of experts who have comprehensive industry knowledge, market insight, and experience with Fund Office operations.

Atlanta  
Boston  
Calgary  
Chicago  
Cleveland  
Denver  
Hartford  
Houston  
Los Angeles  
Minneapolis  
Montreal  
New Orleans  
New York  
Philadelphia  
Phoenix  
Princeton  
Raleigh  
San Francisco  
Toronto  
Washington, DC

**For more information about these and other ATC services, please contact your Segal benefits consultant or Stuart H. Lerner, SVP and ATC's practice leader, at 212.251.5389.**