Bank Investment Teams

Leading-edge, cloud-based technology enables teams to manage research efficiently, collaborate more effectively, and align investment decisions with fiduciary demands

The challenge

Investment research teams operating in a banking environment tend to run lean. The ratio of researchers to private wealth advisors is typically very low. Advisors depend heavily on research and due diligence to ensure their investment choices align with their fiduciary responsibilities. Research teams need an efficient means of collecting, aggregating, sharing, and analyzing data on investment opportunities. They need to be able to align their analyses with the bank's investment guidelines. And they need to be able to deliver their findings and recommendations to advisors in a way that makes sense. Advisors, in turn, rely on that information to make investment decisions and help explain their strategies to clients.

Too often, research teams and advisors are working in silos and sharing information manually, which is inefficient and can result in errors, inconsistent data, miscommunication, and missed opportunities. One platform that serves as a single source of truth for the bank's investment knowledge and analysis, enabling timely collaboration among researchers and with advisors, is essential.

Our solutions

Backstop provides end-to-end, easy-to-use software solutions that incorporate all the capabilities you need to aggregate, analyze, and share research data and recommendations across research and investment teams. Our solutions make essential information easily consumable in productivity tools and dashboards so that advisors can quickly see what is on the bank's "buy" list, and possible red flags.

Our scalable solution increases efficiency by automating and streamlining manual processes, offering comprehensive tracking of investment opportunities, and providing robust reporting based on real-time data that enables agile decision-making. Ultimately, Backstop enables you to serve clients more effectively, improving loyalty and retention.

Challenges

- Voluminous and disparate research datasets

- Inefficient search and inconsistent information repositories

- Difficult cross-team and cross role-collaboration

- Relevant and timely information sharing to a large number of advisors

Proven results

- Strengthen collaboration and decision-making with a single source of truth for researchers and advisors

- Ensure alignment with bank investment and fiduciary guidelines

- Increase efficiency with automation and streamlined operations

- Serve clients more effectively and drive loyalty

Research management

Backstop's Multi-Asset Class Research Management Solution (RMS) provides bank investment research teams with easy solutions for managing due diligence, collecting, aggregating, and analyzing data on investment opportunities, and monitoring active investments

- Monitor and report on qualitative and quantitative data points for due diligence
- Eliminate data silos with a single platform serving multiple researchers tracking different asset classes
- Identify and track ESG opportunities
- Instantly generate "one-pagers" to share research data and buy/sell recommendations
- Convert email attachments to searchable and shareable documents with Backstop for Outlook plug-in

Backstop Integrator

Investment research data and analyses often need to be shared among multiple systems within a bank. Backstop Integrator makes it easy to integrate any third-party application with your Backstop platform leveraging powerful REST APIs – without needing custom engineering, coding, or IT support.

- Connect information across disparate systems in real-time
- Work from a single source of truth that draws on all your data sources
- Increase efficiency and productivity through automation
- Enhance information sharing and team collaboration
- Ensure that institutional knowledge is retained and readily accessible
- Support for disaster recovery; integrate your Backstop platform with offsite data and document storage, search and retrieval

World-class implementation, support and knowledge management

Support at Backstop is more than a call center.

Our expert in-house team works hard to build relationships with our clients so that we can grow with your needs and help you meet your business goals. Product training begins at implementation. New users are assigned a Backstop Project Manager who will serve as your team's primary contact and guide you through the implementation phases, assisting with your questions. In addition, you'll have an ongoing relationship manager, access to our knowledge management team, and much more.

- Industry-specific expertise

- Complimentary training focused on client success

- Support during your business hours

- Community development, including the annual Backstop Beyond user conference, as well as regional networking and training events

Why Backstop Solutions?

For more than 20 years, investment and operations teams have placed their trust in Backstop Solutions. We help our clients maximize the value of their time by removing barriers in their everyday work. From consistent communication to highly personalized customer service, the belief that our clients are our partners is at the heart of everything we do at Backstop. Our software and services are designed with one goal in mind: to help you run your investment operations more efficiently and successfully.

- Over 1,000+ global clients

- Purpose-built solutions to meet the needs of investment research and due diligence

- An experienced professional services team that brings together best practices gained from 13,500 hours per year of implementation experience

- Cloud-based platform enhanced on a regular schedule

- World-class customer service and support steeped in the investment industry

We want to ensure you are getting the most out of your investment, beginning with implementation and continuing with ongoing development and on-demand support

About Backstop Solutions

ION Analytics, a leader in services, data, and predictive capabilities for global capital markets, acquired Backstop in late 2021 with a shared desire to help clients break down the barriers to data access and deliver better decisions. As part of ION Analytics, our industry-leading services redefine the way firms operate in private markets, reshaping the institutional investment industry at the intersection of human insight and machine intelligence. Our core strength lies in developing technology that serves as a definitive source of truth, empowering you with actionable insights, and seamless institutional knowledge sharing, while optimizing day-to-day success.