DASSETI

Transforming Operational Due Diligence: How a Leading ODD Consultant Underpins Excellent Service with Dasseti Collect

Background:

perfORM, a JTC Group company, is an award-winning, multijurisdictional (UK, Switzerland, USA) and standalone ODD solutions provider with 100+ years of collective ODD experience. Clients include allocators (family offices/multi-family offices, private banks, wealth managers, funds of funds, asset managers, pension funds, endowments, foundations), investment managers, service providers and vendors. Launched in 2019, as one of the few dedicated ODD businesses, perfORM has rapidly grown its global client base, underpinned by its credibility, flexibility and use of technology.

perfORM offer allocators on-demand support and have a large coverage of Investment Manager & Fund ODD Reports.

The Challenge:

A successful and respected consultancy business, perfORM wanted to ensure they could scale effectively and efficiency whilst also retaining control over the ODD processes. The team identified a need for a digital solution that could offer a streamlined workflow, enhance client engagement, and provide a centralized system for managing due diligence questionnaires (DDQs).

The Solution:

Dasseti Collect emerged as the selected platform for perfORM, offering a comprehensive suite of features and extensive customization options. The client portal, automated report generation, and visually appealing interface addressed perfORM's operational challenges head-on.

Benefits:

The adoption of Dasseti led to significant improvements for perfORM, including improved operational efficiencies and time savings. Analysts can prefill responses, saving time and effort, and the ability to centralize DDQ responses and streamline report generation has improved internal workflows.

"Dasseti Collect not only meet our immediate needs but has also opened avenues for future growth and efficiency. We are very well supported and look forward to utilising more of the capabilities the platform has to offer."

Quentin Thom, perfORM Due Diligence Services

perfORM
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