## axxsys
Leading Independent
Simcorp Dimension® Consultancy

# SimCorp Dimension® Upgrade Service

## Service Overview

As the markets leading independent SimCorp Dimension® consultancy, we have been managing major upgrades at investment management organisations around the world for over 15 years. Working with the most recent release of the investment management platform has obvious benefits but major upgrades consume staff and systems resource and in many cases firms do not have the skilled resources available to manage the upgrade, which are often complex projects affecting many parts of the business. The Axxsys team are highly skilled industry professionals with detailed knowledge of SimCorp Dimension and have worked on many upgrade projects in the UK, Europe and North America.  We have developed a **robust** Upgrade Service which help our clients to realise the benefits from the new release, with minimum of effort and cost, and creates  a **standardised framework** for future upgrades. Our SimCorp Dimension Upgrade Axxelerator is proven to enhance upgrade times and efficiency and ensure upgrade continuity for the future.

## Axxsys™ Approach

We provide a flexible engagement model tailored to the needs of the business. It can be deployed for the whole project or at any point in the upgrade process. We are driven by the firm's strategic objectives and our goal, using our unique combination of systems and business knowledge as an independent consultancy, is to ensure the business achieves the expected benefits from the upgrade.
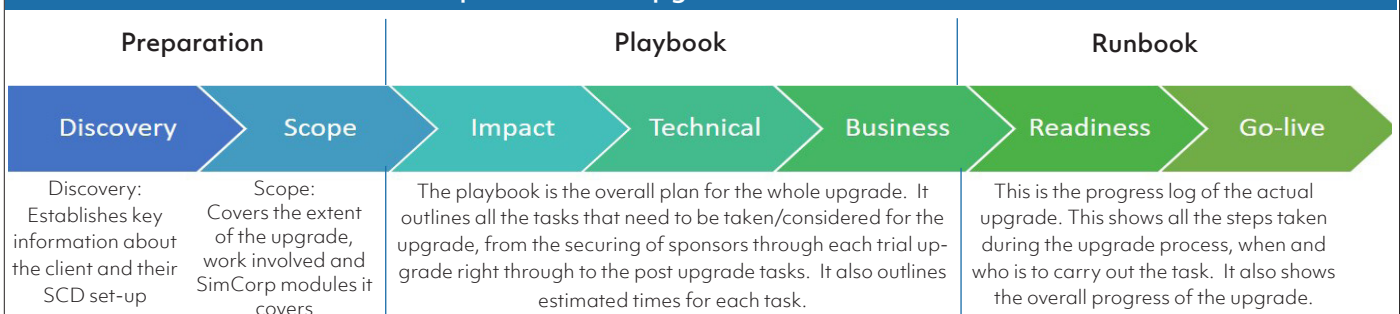
Our service is based on the **Axxsys Axxelerator™** methodology. Our SimCorp Dimension Upgrade Axxelerator incorporates a detailed workflow and comprehensive range of activities that manage the upgrade successfully in a **timely** and **cost efficient** manner.

In collaboration with the client, and the vendor where required, we develop the **upgrade design framework.** This ensures  we fully understand how the business uses the system across investment operations, which will lead to more efficient testing coverage, reduce unnecessary testing and provide solid justifications for the implemented test cases. The objective is to ensure the framework is designed to deliver a cost efficient and **secure upgrade process** for the business.

The execution of the upgrade is based on the upgrade design framework. This framework then becomes the standard and is **repeatable** for future upgrades which for SimCorp Dimension occur at least once a year. The framework will also focus on the implementation of new functionality in the release and ensure business readiness for going live. Using our SimCorp Dimension Upgrade Service creates continuity for future upgrades and provides cost efficiencies with firms already having a **proven basis** for implementing the new upgrade.

If you would like more information please email info@axxsysconsulting.com.

### SimCorp Dimension Upgrade Framework Workflow

| Preparation | | Playbook | | | Runbook | |
|---|---|---|---|---|---|---|

| Discovery | Scope | Impact | Technical | Business | Readiness | Go-live |

| | | | | | | |
|---|---|---|---|---|---|---|
| Discovery: Establishes key information about the client and their SCD set-up | Scope: Covers the extent of the upgrade, work involved and SimCorp modules it covers | The playbook is the overall plan for the whole upgrade.  It outlines all the tasks that need to be taken/considered for the upgrade, from the securing of sponsors through each trial upgrade right through to the post upgrade tasks.  It also outlines estimated times for each task. | | | This is the progress log of the actual upgrade. This shows all the steps taken during the upgrade process, when and who is to carry out the task.  It also shows the overall progress of the upgrade. | |

## Why partner with Axxsys Consulting?

Some of the worlds leading investment managers and largest SimCorp Dimension clients have partnered with Axxsys for large scale upgrades due to our **strong reputation and extensive experience in the market** which is based on our:
- Strong understanding of the investment management sector
- Exceptional knowledge of SimCorp Dimension including 40+ consultants with extensive experience of the platform
- Proven track record of assisting in over 40 SimCorp Dimension upgrade projects
- Very tight control over QA and testing processes to ensure the business achieves its goals
- Axxelerator Platform™ provides a framework delivering an efficient upgrade enabling a rapid time to market for clients

The Axxsys team have all the resource profiles required for a successful upgrade, including **subject matter experts** and a broad range of highly qualified **specialist resources** such as:
- Project Managers
- SimCorp Dimension Specialists
- Data Architects
- Solution Architects
- Business Analysts
- Data Analysts
- Developers
- Testing and QA Experts

![axxsys logo]

**Leading Independent
Simcorp Dimension® Consultancy**

Since our inception in 2003, we have provided specialised consultancy to the global investment management community, providing Advisory Services and Strategic Planning through to full delivery of Major Change Programmes.
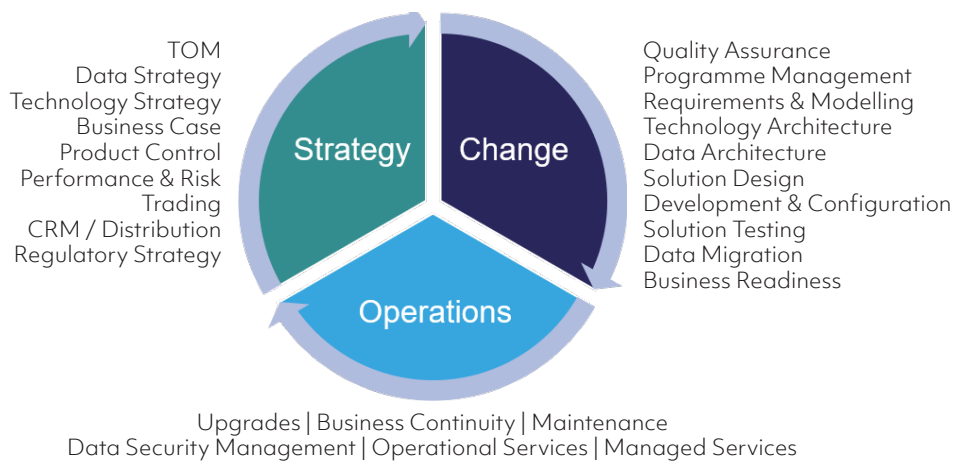
Our core proposition is around our 50+ trusted, highly skilled and knowledgeable industry practitioners who ensure firms achieve outstanding outcomes from their business or technology integration projects. We are proud of our 'trusted implementor' reputation developed with our clients over many years of successful project execution.

This reputation is particularly prevalent with firms using SimCorp Dimension®. We have managed many major transformation programmes involving SimCorp Dimension implementation, migration and upgrade projects using the skills and expertise of our industry consultants who have an in depth knowledge of the platform.

Core to our service offering is the Axxsys Axxelerator™ Platform. Years of accumulated knowledge have allowed us to create a unique and complementary range of Axxelerators™, tools and templates specially designed to help organisations achieve their business goals faster and more efficiently.

Axxsys are part of the Alpha Group, the leading global wealth and asset management consultancy with more than 400 consultants, and Axxsys now operate from Alpha's 12 offices worldwide.

## Our Practices

TOM
Data Strategy
Technology Strategy
Business Case
Product Control
Performance & Risk
Trading
CRM / Distribution
Regulatory Strategy

**Strategy**     **Change**

**Operations**

Quality Assurance
Programme Management
Requirements & Modelling
Technology Architecture
Data Architecture
Solution Design
Development & Configuration
Solution Testing
Data Migration
Business Readiness

Upgrades | Business Continuity | Maintenance
Data Security Management | Operational Services | Managed Services

## Additional Sample SimCorp Dimension® Services From Axxsys

Axxsys SimCorp Dimension Front Office and Analytics Service

Axxsys SimCorp Dimension Performance and Risk Service

Axxsys SimCorp Dimension Complex Instrument Implementation Service

Axxsys SimCorp Dimension Investment & Fund Accounting Service

Axxsys SimCorp Dimension Data Management and Client Reporting Service

Axxsys SimCorp Dimension Solution Architecture Service

Axxsys SimCorp Dimension System Set-Up Review service

Axxsys SimCorp Dimension Support Service
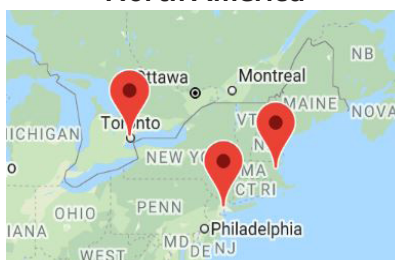
Axxsys SimCorp Dimension End to End Migration Service

## Our Global Office Network

### Europe

London | Edinburgh
Copenhagen | Paris | Zurich
Geneva | Amsterdam

### North America

Toronto
New York
Boston

### Asia

Singapore

![axxsys logo]