

# Overview of SS&C Advent Services

# Advent Services

**Greg Pearl, Assistant Controller, Trillium Management, APX implementation**

"Everything about our implementation was good and communications were great. Advent Services was very quick to get back to us. Responses to our questions and time estimates were pretty accurate. It was a good experience overall."

**Peter Moran, IT Manager, Caledonia Investments, Geneva implementation**

"Advent's project manager adapted our project plan as needs arose and it worked pretty well and kept us on track by giving insightful guidance when we were looking to defer or change the original plan."



# Get the Full Value of Your Technology Investment with Services

Implement	Optimize	Thrive
<ul style="list-style-type: none"><li>• Project Definition Workshop</li><li>• Installation</li><li>• Configuration</li><li>• Training</li><li>• Go Live Event</li></ul>	<ul style="list-style-type: none"><li>• Improve workflows</li><li>• Automate tasks</li><li>• Secure integrations</li><li>• Customize reports</li><li>• Tune performance</li></ul>	<ul style="list-style-type: none"><li>• Expert support</li><li>• Peer Community</li><li>• Expand knowledge</li><li>• Remain current</li></ul>

# Advent Client Experience



## Services

- Project Management
- Business Consulting
- Technical Consulting
- Custom Engineering
- Upgrade Services



## Support

- Maintenance Plans
- Direct Support
- Support Portal
- Community



## Account Management

- Customer Success Managers
- Relationship Managers
- Alliance Partner Management



## Advent Global Service Team

**Americas:** San Francisco, New York, Jacksonville

**EMEA:** London, Stockholm, Oslo, Copenhagen, Athens, Dubai

**APAC:** Manila, Beijing, Hong Kong

# Advent Implementation Methodology (AIM)



**Internal Handoff & Client  
Intro to Services**

**Kickoff**

**Define &  
Organize**

**Implement**

**Track &  
Manage**

**Close Out**



# Define and Organize



## Project Workshop

- 1 to 3 day effort
- Top-down project construction
- Review workflows
- Measurable results

## Project Definition Document

- Project Objective
- Success Criteria
- Major Deliverables
- Includes/Excludes

## Project Plan

- Assumptions
- Team Roster
- Risks & Mitigation Plans
- Change Management

# Track & Manage



## Project Managers DAILY TO WEEKLY

- Coordinate actual work vs. planned
- Manage tasks and issues
- Forecast and prevent risks
- Coordinate Advent resources

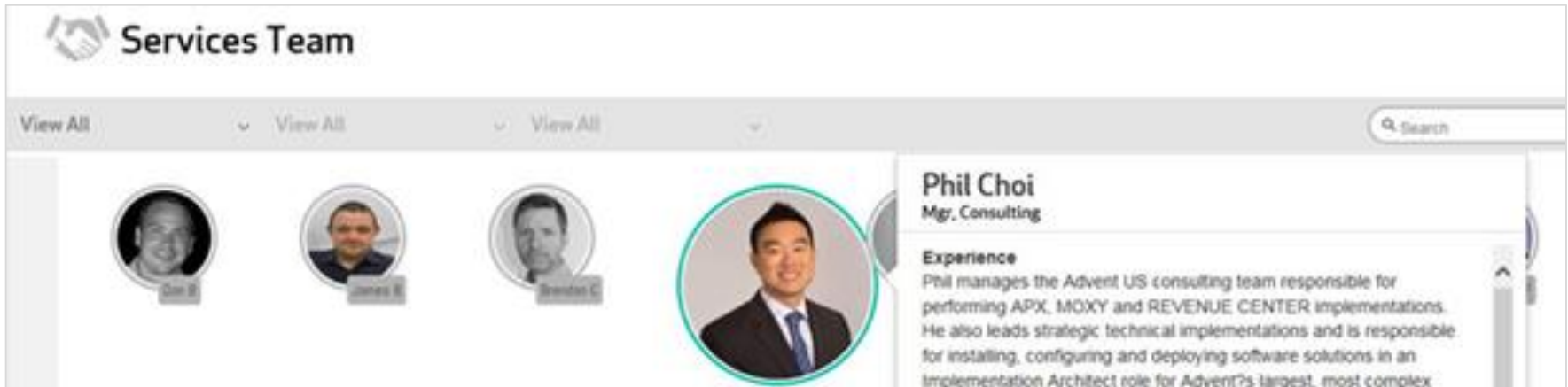
## Projects Sponsors MONTHLY

- Summarize work completed to date
- Measure progress towards milestones
- Manage budget
- Address issues or risks to project success

## Project Resources DAILY TO WEEKLY

- Application configuration
- Technical environment development
- Integration developments
- User training
- Workflow development

# Advent Services



## Backed by Advent as a Whole

- 100+ Service resources globally
- We know the product best
- Proven methodology adapted for you
- Best practices from 1000s of engagements

## Serving You

- 700 years Advent experience
- Average Services tenure of 8 years
- 10+ service hubs worldwide with 6 in EMEA & APAC



Firms using Advent Services are 3x more likely to **score their experience 9 or 10**