Success Story

eFront FrontGP Implementation and Project Management

SteelBridge

Overview

Steelbridge led the project management and implementation for eFront's FrontGP product for a long established middle-market PE fund manager to migrate their $4 billion in transactions. Our team contributed to the successful implementation by understanding all the client's historical data and configuration needs. Our deep FrontGP product knowledge and experience helped make the daunting task of implementing go quickly and smoothly.

Client Challenge

- Complex fund holding and investment structures with heavy use of offshore and cross fund holding investments present unique challenges
- Challenges of client trying to self project manage such a complex system implementation
- Staged implementation did not allow enough time to address issues with earlier funds
- Need for fulsome conceptual design and configuration document to drive project forward
- Ability for resources to focus on initial implementation activities posed challenges for conversion goals and timeline

SteelBridge Impact

- Required system and conceptual design documentation to hold all parties accountable to system design
- Identified gaps in the design documentation and assigned takeaways for all teams
- Crafted detailed project checklist and scorecard to manage all implementation deliverables and track their status
- Converted data into loadable templates to streamline and increase the speed of the overall implementation
- Defined and documented the requirements for the business events and reports during the data conversion process
- Implemented use of detailed task level project plan to monitor progress for all fund activity during its conversion

Project Approach

Process
- Documented business requirements, configuration testing scenarios, and user process guides that document operations and system steps
- Utilized project task management software

Data
- Converted data both manually and using custom templates to successfully allocate fund transactions and migrate static data
- Cleaned and mapped historical data and identified gaps to ensure a clean migration

People
- Coordinated Steering Committee level meetings with all stakeholders to achieve transparency across teams
- Created project milestones with detailed dashboard to coincide with the project plan

Design
- Created conceptual and system design document to properly map all system functions
- Designed workflow templates for high frequency items

Management
- Unlocked valuable fund account team time by managing project and data conversion
- Managed the coordination software development and business analyst teams with vendor

Contact Us

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