

THE ASSET & INVESTMENT MANAGEMENT DATA FITNESS SCORECARD

10 questions for risk-aware Technology Leaders

Use this scorecard to evaluate technology partners based on what matters most in asset and investment management: data alignment, decision confidence, operational efficiency, and audit readiness.

For each item below, rate potential partners on a scale of 1–5 (1 = Not at all, 5 = Fully meets standard):

1. Can the partner demonstrate how their solution improves data alignment across portfolio, risk, and client systems?

Misaligned data slows decisions and creates unnecessary risk. Look for clear evidence that systems produce a consistent, unified view of the business.

Score: ____

2. Does the solution provide timely, reliable access to data that can be used without repeated validation?

If your teams still need to “check the numbers,” your data is not decision-ready.

Score: ____

3. How effectively does the solution reduce or eliminate manual reconciliation?

Manual processes introduce delays, errors, and operational drag. The right approach reduces reliance on spreadsheets and workarounds.

Score: ____

4. Are data lineage, audit trails, and transparency built into how the system operates?

Audit readiness should not require extra effort. It should be a natural outcome of how data flows through your environment.

Score: ____

5. Can the platform integrate with your existing systems without creating additional complexity?

Look for flexible, API-driven architectures that connect portfolio management, risk, trading, and client reporting systems — without forcing disruption.

Score: ____

6. Does the solution improve decision speed — not just reporting speed?

Faster reports are helpful. Faster, more confident decisions are what matter.

Score: ____

7. How well does the partner align automation with control and visibility?

Automation should reduce effort while maintaining transparency — not introduce a “black box” that creates new risk.

Score: ____

8. Does the partner strengthen your compliance posture as part of normal operations?

Evaluate how the solution supports:

- Consistent data outputs
- Repeatable processes
- Clear audit trails

Compliance should be embedded, not bolted on.

Score: ____

9. Are the solutions scalable and adaptable to changes in strategy, structure, or regulation?

Your infrastructure should support growth, new investment strategies, and evolving regulatory requirements — without requiring constant rework.

Score: ____

10. Does the partner demonstrate a clear understanding of how investment decisions are made in your organization?

A true partner understands:

- Portfolio workflows
- Risk evaluation processes
- Client reporting requirements

They should improve how your organization operates — not just what systems you use.

Score: ____

Final Assessment

- **Total Score:** ____ / 50
- Suggested Threshold for Consideration: 40+

How to Interpret Your Results

- **40–50** → Strong alignment with data fitness principles; capable of supporting confident, timely decisions
- **30–39** → Moderate gaps that may introduce operational friction or risk
- **Below 30** → Likely to increase complexity rather than reduce it

Take the Next Step

Want a deeper look at how to improve data alignment, reduce operational friction, and strengthen decision confidence?

Download our white paper: *"Data Fitness in Asset & Investment Management: A Foundation for Confident, Timely Decisions."* Or connect with an ABI specialist for a practical discussion about where your current environment may be slowing you down.

About Anchor Bridge Innovations

Anchor Bridge Innovations (ABI) helps asset and investment management firms modernize their operations by improving how portfolio, fund, and reporting data is defined, aligned, and governed. We work with mid-market investment firms to strengthen performance visibility, investor reporting reliability, and valuation defensibility — focusing on practical, scalable improvements that reduce operational risk and support confident decision-making.

At ABI, we don't lead with technology — we help asset and investment management firms establish data clarity, strengthen governance, and modernize deliberately without sacrificing control or credibility.