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DMS Technology Services for Private Equity Firms and Hedge Funds

Business-Driven Advisors

Your business objectives should drive IT solutions. DMS advisors translate your business objectives—profitability, regulatory compliance and cost containment—into the technology that will help you achieve them.

DMS advisors help you leverage IT as a strategic asset by making more profitable technology-related business decisions. [MORE](#)

Technology Management

Having built the technology infrastructure that supports some of the world's leading private equity and hedge fund firms, our team is uniquely qualified to manage the technology that runs your business.

You'll gain enterprise-level technology expertise plus business and regulatory acumen to more profitably manage your IT environment—leaving you to focus on top line growth. [MORE](#)

Hot Topic: SEC Compliance

Learn how new regulations for investment advisers will impact your IT requirements.

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▶ Our Services

Strategic IT Advice and Technology Deployment

Technology Management

Our Services

It takes more than technology to effectively and profitably run your private equity firm or hedge fund amidst a changing regulatory environment. That's where DMS services enable a competitive business advantage from top-line growth to bottom-line savings to regulatory compliance.

Having worked at the executive and managerial IT levels of some of the world's largest investment banking firms, DMS advisors excel at translating business objectives into effective technologies that will help you achieve your business objectives.

Strategic IT Advice and Technology Deployment



DMS advisors help you leverage IT as a strategic asset by making profitable technology-related business decisions. Our advisors work with you to answer the tough questions including: What's the cost vs. benefit? Will today's IT investments support tomorrow's business deals? How much flexibility is needed to quickly capture business opportunities without compromising compliance? [MORE](#)

Technology Management



Run your business more efficiently and profitably without the overhead of an IT department. You'll gain enterprise-level functionality and reliability but at cost-effective scale required by a small to mid-size private equity firm or hedge fund. [MORE](#)



Our Services

► Strategic IT Advice and Technology Deployment

► Compliance

Technology Management

Strategic IT Advice and Technology Deployment

The most successful investment banking firms leverage Information Technology (IT) to drive top line growth and bottom line savings. That's where DMS Technology advisors deliver added business value.

Having developed IT strategy and plans for the world's leading investment banks, DMS advisors excel at transforming your business objectives into the technology that will help you achieve them. Our technology strategy is simple, yet effective:

Technology investments must support the key business drivers of small and mid-size private equity firms and hedge funds including profitable revenue growth, cost containment, operational efficiency, and regulatory compliance.

Business-driven IT Strategy for Private Equity Firms and Hedge Funds

When business objectives drive technology strategy and deployment, most firms spend less, operate more cost effectively and comply with regulations. Our experience with small and mid-size private equity firms and hedge funds has led to the following approach:

- Virtual CIO – We create very close working relationships with our clients. In fact, many of our clients refer to Jonathan, our founder, as their Chief Information Officer.
- Virtual CIO – For most small and mid-size firms, it's not cost-effective to hire a full-time Chief Information Officer (CIO); however, CIO experience and expertise are needed. Our advisors cultivate close strategic partnerships with you, often to the point where some firms refer to us as their "CIO."
- Business-driven Communication – When it comes to IT strategy and counsel, we speak the language of business... not technical jargon. We answer the questions executives ask including: What's the technology cost vs. benefit? What's my ROI? Will today's IT investments support tomorrow's business deals?
- Best Practices – You'll gain IT best practices honed from our more than 50 years' senior management experience designing and managing the technology infrastructures of some of the world's leading investment banks.
- Right-sized Solutions – Avoid technology over-spend, under-utilized IT assets and functionality gaps that compromise operating efficiency and regulatory compliance. Our technology advisors deploy similar robust systems that run leading investment banks, scaled to fit your operational requirements and budget.

IT Practice Areas

DMS Strategic IT Advice & Technology Deployment encompass every aspect of private equity firms and hedge funds relative to technology including:

Compliance

For most private equity firms and hedge funds, regulatory compliance will have a significant impact on data management and governance. While it is essential for investment firms to comply, doing so profitably is equally as important.

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- Service Desk/End-User Computing – supporting the people and computers in your office
- Systems/Cloud Computing – web based applications
- Infrastructure – the hardware and applications that run your business effectively
- VoIP/Unified Communications – voice communication and device computing

Our Process

Ensuring the success of your IT deployment involves an in depth understanding of your business, its drivers and key people involved. We'll meet with you to discuss your business objectives and expectations. Following a technology gap analysis you'll receive strategic technology recommendations that can meet your business objectives in a practical and cost-effective way.

Smooth Deployment

Downtime is not an option when it comes to technology deployment in an investment banking firm. That's why our team of seasoned technologists developed deployment procedures that minimize interruption to your firm's productivity and business transactions.

DMS advisors developed technology management strategy and plans for some of the world's largest investment banking firms. [Learn how DMS Technology Management advisors can give you a competitive business advantage.](#)



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Our Services

Strategic IT Advice and
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Technology Management

Whether you run a small or mid-size private equity firm or hedge fund, technology is as important to the efficiency and profitability of your firm as it is to Fortune 500 firms. That's the DMS advantage... we deliver enterprise-level information technology at a cost-effective practical scale required by small to mid-size firms. More importantly, you gain operational efficiency without the overhead of an IT staff. We call it the *DMS Model*.

The *DMS Model* for Technology Management

A proactive technology management plan ensures that you invest in the most effective technology that supports your business objectives and produces a good ROI. From trading speed and reliability to business intelligence and regulatory compliance, the DMS Model ensures that you have the right technology optimized to run your business profitably and effectively including:

- Standardization – reduce maintenance costs and ensure a more stable reliable computing environment with this Fortune 500 technology management basic, which uses "standard build" computers that are tested and verified for stability and reliability.
- Proactive Updates & Patches – avoid computer-related downtime and network incompatibility by deploying only those hardware or software patches that have been tested for stability and deemed necessary.
- Continuous Monitoring – pinpoint potential issues before they affect reliability, such as diagnostics that pre-empt hard drive crashes and keep your information rapidly available when and where you need it.
- Proactive Hardware Recycling – optimize the performance of your IT assets whether upgrading or replacing them before they impact system uptime or reliability.
- Service Desk (Available 24/7/365) – our 60-second resolution goal keeps you running at the speed and service levels required by Fortune 500 investment banks.

Technology Management Reporting

Our monthly reports include an advisor who meets with you each month to review your system performance via our Executive Dashboard, which includes vital statistics. Your advisor will also discuss your business requirements in addition to changes in the technological or regulatory landscape that may affect your system.

DMS advisors developed technology management strategy and plans for some of the world's largest investment banking firms. [Learn how DMS Technology Management advisors can give you a competitive business advantage.](#)



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Our Expertise

You know how to run a profitable private equity firm. We can help you run it more effectively by leveraging the right technology when and where you need it.

Our technology model applies Fortune 500 sophistication at small to mid-size scale. It focuses on four mission critical IT areas that run your business.

Service Desk/End-User Computing

- Technology Standards and Software Image Management
- Monitoring
- Patch Management
- Anti-Virus
- Internet Filtering
- Support Portal
- Onsite Support
- Moves, Adds, and Changes
- Technology Recycling
- Asset Management

Systems/Cloud Computing

- Applications
- Messaging
- File Management
- Database
- SharePoint
- Backup and Storage
- Business Continuity
- Regulatory Compliance

Technology Infrastructure

- LAN and WAN Technology
- Security Management
- Wireless
- IPS – Intrusion Protection System
- Network Monitoring

VoIP/Unified Communications

- Hosted Voice
- Circuits or Bandwidth
- Unified Messaging
- Hosted Workspace Sessions
- Mobile Communication
- Video and Audio Conferencing

DMS advisors have designed and managed the mission critical technology infrastructures of some of the world's largest investment banking firms. [Learn how DMS Technology Management advisors can give your private equity firm a competitive business advantage.](#)



Case Study

Learn how a private equity firm—in a multi-billion dollar spinoff—successfully deployed a robust IT system with zero downtime.

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Case Study: Financial Services IT Environment Build Out

Who We Serve

We specialize in technology that runs private investment firms. Our clients include private equity firms, hedge funds, family offices, venture capitalists, and other private investment firms that employ fewer than 75 people.

We've become our clients' full-service IT department — from virtual CIO to service desk. We also guide technology strategy and planning at many of our clients' portfolio companies in addition to performing discrete IT-related projects for large companies.

Small to mid-size private investment firms rely on DMS Technology to run their businesses efficiently and profitably while meeting regulatory compliance.

Case Studies

- [Financial Services IT Environment Build Out](#)

Learn how a private equity firm—in a multi-billion dollar spinoff—successfully deployed a robust IT system with zero downtime. [READ MORE](#)

DMS advisors have designed and managed the technology infrastructures of some of the world's largest investment banking firms. [Learn how DMS Technology Management advisors can help you run your private equity firm efficiently and profitably.](#)