

# **ARE YOU IN THE 26% OF CRD CLIENTS WHO ARE ON-PREM?**

**OUR **CRIMS ON-PREM ASSESSMENT** ADDRESSES COMMON CONCERNS:**



**HIGHLY CUSTOMIZED ENVIRONMENTS**



**PERFORMANCE AND SCALABILITY**



**LOSS OF CONTROL**



**SIZE OF EFFORT**



**TOO MANY VERSIONS BEHIND**



# Benefits of Moving CRIMS to SaaS

## Embed Resilience into Your OMS Platform



### **Leverage Latest Functionality**

The Charles River product roadmap is moving faster than ever—packed with powerful new features ready for you to leverage, including private markets, AI, wealth, ETF, and Data Management features.



### **Interoperability**

Integrate with the Charles River Partner Ecosystem which includes Bloomberg, Opturo, MSCI, FactSet, Axioma, Rimes, and many more.



### **Security, Risk and Compliance**

Utilize updated and industry standard security protocols as well as compliance and regulatory reporting.



### **Cost Efficiency**

No need for heavy capital expenditure on hardware, numerous perpetual licenses, and internal overhead, turning CapEx into predictable OpEx.



### **Cloud Strategy Alignment**

Align your enterprise cloud strategy for disaster recovery and unified data platforms which include Snowflake and Parquet



### **Accelerate Upgrade Cycle Time**

Stay perpetually modern with faster upgrades and keep your front-office users on a modernized platform.





# On-Prem Assessment Anatomy

## An End-to-End Diagnostic of Your Environment

### **Leading with the Front-Office**

Applying TorreBlanc's structured framework, our CRMS experts will examine how Charles River contributes to the alpha generation value chain in addition to the technical aspects described below.

### **Configurations and Workflows**

Review of all modules and user workflows that are utilized.

### **Customized Development**

Survey all UX, API Integrations, and Back-End customizations.

### **Compliance Tests**

Upon request, an examination of compliance rules and data exceptions.

### **Data, Imports, and Exports**

An appraisal of data quality associated standard imports and exports.

### **System Administration**

A bottom-up examination of the hardware, database, middle-tier, privileging, system parameters, and other admin components.

### **Scalability and Performance**

Evaluate utilization trends, high-volume transaction periods, global usage and batch loads.



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# Roadmap to Resilience

## A Customized Approach

### Building Your Roadmap

TorreBlanc will build a roadmap that will address your questions and concerns about a potential migration to SaaS, and propose solutions in the following sections:



#### Operational Heatmap Assessment

An analysis that describes the health of the system, problem areas, and potential quick-fixes.



#### Customization Alignment

Recommended rationalization of customized builds and a long-term view that aligns functional needs with the CRD product roadmap.



#### Operating Model Changes

A move to SaaS will make changes to the support operating model, which will be described here along with any other adjustments.



#### Solution Architecture

In collaboration with the vendor, a proposed cloud-centric architecture that considers scale, security, and interfaces of what a future state would look like in a SaaS environment.



#### Migration Blueprint

An approach that will describe the sequential actions for a SaaS migration which considers user impact, required development, and seeks to minimize risk.





# Why TorreBlanc?

Our Specialty is Your Value

## **We Know Our Way Around the System**

On average, our consultants have 15+ years working with Charles River. Many of them have been employees of on-prem clients or are previous employees of CRD. TorreBlanc is able to foster a collaborative relationship with the vendor.



## **We Specialize in the Whole-Office**

When it comes to front, middle, or back office workflows, we scale horizontally. Vertically, our depth goes beyond hard to find skills like fixed income, OTC, private markets.



## **Global Reach**

We live where you need us. Our team members reside in EMEA, APAC, and North America. We have experience working with global clients with global initiatives.



**Is there a topic not included? Let's schedule a call.**



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