



**LEERINK**   
PARTNERS

## Leading Investment Firm Embarks on Data Modernization Strategy to Drive Innovation and Growth

### CHALLENGES

#### **Systems Fragmentation**

Post-divestiture, systems and processes required rapid reintegration and modernization

#### **Legacy Compatibility**

Needed to synchronize real-time data across old and new platforms

#### **Resource Constraints**

Limited visibility into fund flows and investor-level performance

#### **Business Continuity**

High pressure to modernize without disrupting ongoing operations

### EXECUTIVE SUMMARY

Leerink Partners, following its separation from SVB Financial Group, embarked on a strategic data modernization effort to support future growth and innovation. With support from Clarista, Leerink implemented a secure, cloud-native data platform that connected legacy systems with new SaaS tools, such as CRM, laying the foundation for real-time analytics, operational efficiency, and long-term AI capabilities. In just four months, the organization transitioned from fragmented systems to a governed, scalable platform ready for advanced business intelligence.

“What sets Clarista's approach apart is its integrated capabilities, harnessing AI-powered automation to deliver faster results. Through transparent processes and comprehensive data tracking, client teams experience seamless implementation with no surprises, benefiting from automated monitoring and complete auditability from day one.”

**Jeff Gerson, Managing Director-CIO, Leerink Partners**



## A THREE PHASE COLLABORATIVE APPROACH

### • Connect

Clarista helped Leerink design and deploy a secure Azure data lake, serving as a central hub to bridge legacy systems with new SaaS solutions, including CRM—enabling real-time data movement without disrupting business operations.

### • Manage

Using Clarista's Data Fabric, the team created 25+ real-time, bi-directional interfaces between legacy and modern systems. Intelligent transformation logic preserved compatibility with legacy stored procedures, while automated validation and monitoring ensured data reliability.

### • Consume

Clarista implemented AI-powered governance tools, data cataloging, and dashboards to turn raw data into actionable insights. This laid the groundwork for predictive analytics, AI use cases, and transformation of hundreds of legacy code bases—all while delivering business value through faster, more strategic decision-making.

## STRATEGIC OUTCOMES

- **Rapid deployment** of a modern data platform in just 4 months
- **Real-time synchronization** between legacy and SaaS systems
- **Increased data transparency** and **automated monitoring**
- **Readiness for advanced analytics** and AI-driven use cases
- Improved data **quality**, **consistency**, and **auditability**
- **Accelerated business intelligence** and productivity

## CONCLUSION

Leerink's data modernization journey exemplifies how lean teams can achieve large-scale transformation efficiently. By combining a clear vision with Clarista's agile platform and governance tools, Leerink built a strategic data foundation—ready for AI, analytics, and future innovation. The firm transformed complexity into clarity, proving that rapid, transparent, and sustainable modernization is possible without multi-year, multi-million-dollar investments.