



Convergence Service Provider Intelligence (SPI)

Independent service provider selection and benchmarking intelligence

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Product Description

- Service Provider Intelligence helps investment advisers evaluate, compare, select, and document service provider decisions using independent market intelligence. SPI shows which providers serve comparable advisers, funds, strategies, domiciles, and operating profiles, giving finance and operations teams a stronger basis for provider review and RFI or RFP planning.

Product Benefits

- **Creates a More Objective Review Process:** replaces broad provider research with structured, comparable market evidence.
- **Reduces Manual Shortlist Development:** helps teams identify qualified administrators, auditors, custodians, and prime brokers more efficiently.
- **Strengthens Provider Conversations:** adds market context on experience, growth, concentration, client fit, fees, and service levels.

Product Features

- **Custom Provider League Tables:** filter providers by type, geography, fund type, strategy, assets, fund count, client count, growth, and concentration.
- **Provider Profiles and Fit Analysis:** show book of business, client mix, fund exposure, wins, losses, growth, and the rationale for provider inclusion.
- **Review-Ready Delivery:** provides Knowledge Center views and PDF, Excel, or CSV outputs for internal review and RFI or RFP planning.

Primary Use Cases and Delivery

- **Primary Users:** CFOs, COOs, operations leaders, vendor management teams, CCOs, and executive sponsors responsible for provider governance.
- **Common Use Cases:** annual vendor reviews, provider shortlists, current-provider evaluation, fee discussions, new product launches, and international expansion.
- **Why Convergence:** SPI combines service provider family mapping, peer benchmarking, relationship history, and curated Knowledge Center intelligence in one workflow.