

## Profile

### Firm type

- > South African asset management firm
- > Over R600 billion in assets under management
- > Focused on innovative investment solutions

### The challenge

- > Need for automated reconciliation solution
- > Required flexibility to scale with growth
- > High transaction volume management

### The solution

AutoRek implemented an automated client money solution that streamlined reconciliation processes. This solution ingests data from various sources, validates balances, and performs data checks, allowing STANLIB to focus on resolving discrepancies.

### The benefits

- > Fully scalable to support company expansion
- > End-to-end automation for greater efficiency
- > Enhanced cross-team collaboration
- > Ease of use and self-sufficiency
- > Comprehensive data control

## Case Study

# Transforming reconciliation processes for South Africa's leading asset manager

## Client Overview

STANLIB is a prominent South African asset management firm, managing over R600 billion in assets. The firm is dedicated to delivering innovative investment solutions while ensuring compliance and operational efficiency. With a focus on scalability, STANLIB sought a solution that could adapt to their growing business needs.



**"AutoRek has been one of the most stable tools in our tech stack during our growth period over the last few years. With automation, our team has seen a massive increase in productivity and have more time to focus on value-add tasks."**

Rustam Juguth, IT Infrastructure/Vendor Support Head at Stanlib

## Challenge

STANLIB sought an automated reconciliation solution that was flexible and could scale alongside business expansion.

As an investment manager, it was equally crucial that STANLIB acquired a tool that could handle large volumes of transactions.

## Solution

AutoRek implemented an automated client money solution to streamline and simplify reconciliation processes.

- > The solution ingests data from multiple different sources and then validates balances between internal and external sources. It also performs data validation checks and creates custom reports ahead of matching, giving STANLIB more time to focus on true discrepancies.

## Benefits

### 1. Fully scalable to support company expansion

STANLIB came to AutoRek in the early stages of business looking for a flexible solution to support their scaling ambitions. With a flexible solution now in place, they can continue to expand operations with no concerns around reconciling growing transactional volumes.

### 2. End-to-end automation for greater efficiency

Before implementing AutoRek, STANLIB's reconciliations were manual and performed in Microsoft Excel. However, higher levels of automation have reduced the risk of manual errors and freed up employees to focus on more critical areas of the business rather than repetitive data work.

### 3. Enhanced cross-team collaboration

The in-built workflow functionality of AutoRek has allowed STANLIB to connect its departments together more seamlessly. During the matching process, different teams across the business – whether finance or operations – are aware when items don't match and find their resolution much simpler. The permission controls functionality also ensures that employees operating the AutoRek platform have the necessary authorisation to do so.

### 4. Ease of use and self-sufficiency

STANLIB wanted a tool that was built with usability in mind. The intuitive and straightforward user interface on the front end of the AutoRek solution has removed a lot of the friction for end users when managing reconciliations.

### 5. Data control

Comprehensive data validation checks, and custom reporting have put STANLIB in complete control of their financial data. While reducing manual processes was the primary goal for STANLIB, they also wanted a solution to surface MI and other key insights into business performance.

**When accuracy counts—be sure.**

Get ready to transform your reporting processes

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