DORSUM

Case Study: Sarasin & Partners

> *"Our relationship with Dorsum has been excellent from the start. We had a clear vision of what we wanted to achieve, and Dorsum was there every step of the way. Their flexibility and ability to custom-build to our needs has allowed us to create something remarkable: a first-class digital channel that gives us a new way to communicate with our clients."*
>
> **Hadley Simons,**
> **Sarasin's Chief Operating Officer, Head of Client Affairs & Partner**

Sarasin and Partners, the £17bn AUM wealth manager, wanted to give their clients an easier, more flexible way to view their investments – a digital channel that enabled them to securely log in to see their portfolio and performance. For Sarasin, this provides an additional distribution channel, and a way for their clients to further connect with their portfolios and the wealth manager's services.

The relationship was collaborative from the very beginning. Sarasin had a clear idea of their clients' needs and expectations, while we contributed the technical nous and expertise to bring that vision to life.

The partnership was hands-on and iterative. Through design mock ups and prototypes, Sarasin could see the service develop and provide regular feedback.

The close collaboration led to the creation of a secure, user-friendly portal that enables Sarasin's clients to view their investment breakdown, track performance and access market insights and thought leadership from Sarasin's experts, all in one place.

The response from clients was overwhelmingly positive. "As good as it gets," is how one of Sarasin's clients put it.

The partnership has been going for five years and we continue to work closely to improve the digital experience and maintain the now essential service for Sarasin's clients.

STATS

73%
of Sarasin clients use the portal

92%
use the portfolio overview & performance

69%
of Sarasin clients said the portal was "user friendly with good functionality"

DORSUM

At-A-Glance: The Partnership Timeline

2020

Dorsum and Sarasin begin work on the creation of a custom-built portal. Work includes design concepts, mock portals and ongoing communication around Sarasin's needs.

2022 Q1

The portal is launched and met with enthusiasm from Sarasin's clients.

2022 Q4

ESG functionality is introduced, allowing Sarasin's clients to view and understand the sustainability profile of their investments.

2025 Q1

The suitability function is rolled out to clients.

Ongoing

The partnership continues to evolve, with ongoing work focusing on further enhancing the digital experience.

"We've never doubted our decision to partner with Dorsum. This collaboration is the true definition of partnership, and together we'll continue to deliver for our clients in the years to come."

Dorsum partners with Sarasin to deliver custom-built wealth management technology shaped around the needs to Sarasin's clients.

"Dorsum created the ability for us to change the suitability questions ourselves without a technologist being involved. And that's not the work of an average IT company. An average IT company charges you for redevelopment. An exceptional IT company gives you the ability to self-serve, edit and develop it. They have the confidence and belief in themselves that actually they can build a richer relationship when you give people that functionality.

We had one client say to us that this is so refreshing. Rather than simply transmitting what you need to tell us, you've got all the things [on the portal] that we're interested in. People said… you've got these really interesting videos and thought pieces about individual stocks and macroeconomics in my portfolio. This is so much more interesting than downloading a valuation and that was a real runaway success.

We are working with a business where we can just talk at them, convey our visions, how we want to communicate to our clients, and it's turned into something tangible. That ability to have a vision and to then see it mocked up and delivered is number one. That does not happen if you choose another provider."

Who is Sarasin?

Sarasin is a UK-based global investment manager. It invests thematically and responsibly on behalf of charities, private clients, institutions and investment professionals. It looks after more than £17bn AUM.