Linedata Global Services: Driving Operational Excellence with Linedata Optima

How Linedata Global Services uses its own operations platform to simplify workflows and deliver scalable services to institutional clients.

Linedata Optima:

Orchestrating smarter operations

Linedata Optima is an open, AI-enabled operations platform that unifies workflows, systems and operational controls within a single governed environment. Designed to support investment operations, fund administration and oversight, Linedata Optima helps clients connect existing back-office systems through APIs to orchestrate end-to-end processes without replacing the technology infrastructure they already use.

By centralizing workflow execution, exception management, service-level agreement (SLA) monitoring, and audit trails, Linedata Optima helps organizations move from reactive, manual processes to a management-by-exception model.

Linedata Global Services:

Expertise backed by technology

Linedata Global Services helps investment firms streamline operations, manage costs, and scale their businesses through outsourced and co-sourced services. Its specialists complement client teams across operational, analytical, advisory, and financial functions, combining buy-side expertise with technology and industry best practices. This enables clients to focus on their core activities while benefiting from scalable operational support.

Linedata Global Services runs its own service delivery on Linedata Optima, giving it a single, governed way to manage increasingly complex client requirements.

The use case:

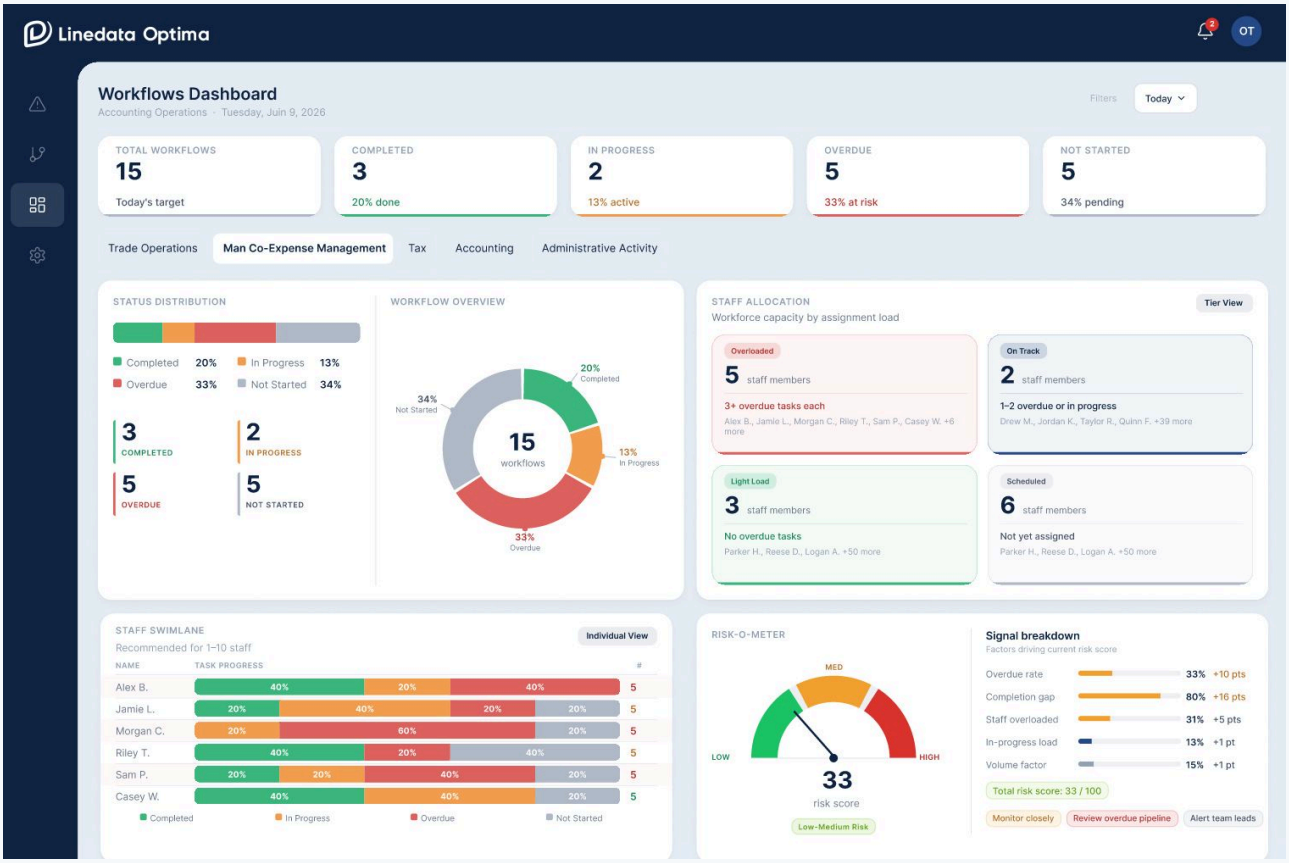
Scaling middle-office operations with Linedata Optima

Supporting institutional clients with more than **USD 2 trillion in assets across 76 technology platforms**, Linedata Global Services operates in a complex, multi-system environment. To ensure consistent execution, traceability, and SLA oversight, Linedata Global Services deployed Linedata Optima as a central **execution and recording platform across its technology ecosystem**.

Implemented across **420+ users in just eight months**, the platform provides a common framework for coordinating operational activities across systems and teams.

Through Linedata Optima, Global Services consolidated more than **7,000 client-specific workflows into 170 core operational tasks**, embedding ownership, SLAs, approvals, and audit trails directly into processes. This centralized approach provides teams with real-time operational visibility, greater process consistency, and stronger oversight across the technology landscape.

Linedata Optima's orchestration capabilities also support a shift toward more intelligent, exception-based operations. Its evolving agentic AI capabilities build on this foundation, helping to automate exception resolution and optimize workflows while maintaining governance and auditability.



"Our challenge was never technology. It was consistency," said Marcella Crossman, Senior Vice President of Global Services at Linedata. "Our teams now spend less time chasing status and more time resolving exceptions, and clients get the same controlled execution no matter which system sits underneath."

Looking ahead, Linedata Global Services plans to use the operational data captured in Optima to predict where work will break and route it before it does, and to extend agentic AI into exception handling. Together, these steps will deepen automation and bring Linedata's software and services capabilities closer together.

"You can't automate what you haven't standardized," said Crossman. "Optima gave us a single, governed record of how work actually flows across our operations, and that data is what makes intelligent automation possible. For our clients, that means faster, more predictable execution today and a clear path to agentic operations tomorrow."

About Linedata

With over 25 years' experience and 700 clients in 50 countries, Linedata's 1400 employees in 20 offices provide global humanized technology solutions and services for the asset management and credit industries that help its clients to evolve and to operate at the highest levels.