

Leading Global Asset Manager Launches Compliance-focused Pitchbook Automation Solution.

Case Study



SUMMARY

This large global asset manager was seeking a presentation management and compliance workflow solution with a user-friendly and integrated user experience. The diverse and global nature of their business imposed complicated rules around content control, user permissioning and cross-workgroup collaboration. Synthesis' sales enablement solution was selected to automate data updates, manage slides, and create customized presentations. Red Oak's AdMaster workflow tool was deployed to manage compliance review. These two vendors were tasked with creating an integrated and seamless solution to satisfy the unique needs of diverse global workgroups, while ensuring compliance was at the heart of all their sales communication efforts.

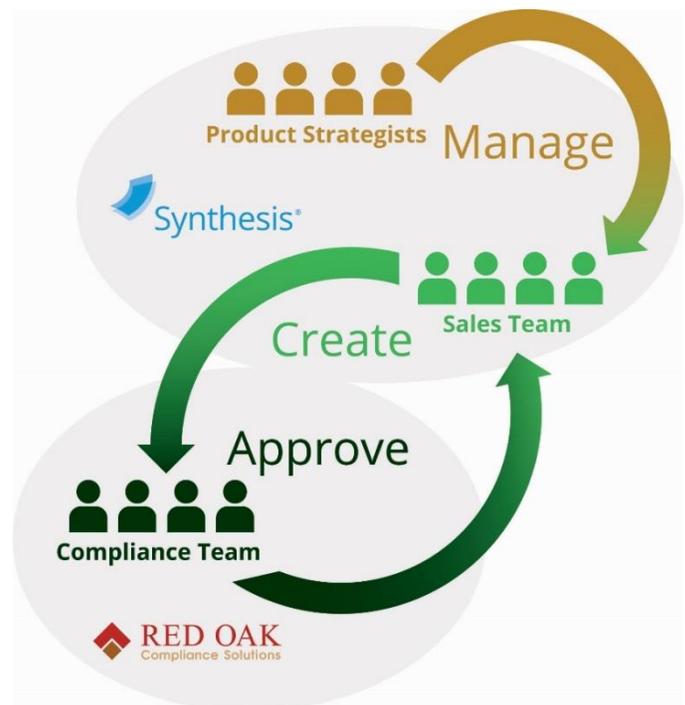


*Marshall Christopherson,
Project Manager at Synthesis*

"Our client saw a great opportunity to streamline their pitch book creation and approval process, save time, and minimize risk. By integrating our sales enablement solution with AdMaster, we were able to accomplish that."

THE GOAL

The client's vision was to create a central repository of compliant content for their global sales teams. This repository would hold over 4,000 slides and provide access for more than 1,000 sales users for different distribution channels in different regions across the globe. There are over 1,000 Product strategists who create and manage presentation content for the firm's different asset classes. The goal was to integrate the Synthesis and Admaster platforms to create one seamless, efficient process for creating, managing, approving, and tracking presentations.



“By integrating best-of-breed technologies like Synthesis’ sales enablement solution and Red Oak’s AdMaster together, global asset managers are able to improve market and customer delivery timelines in a way that improves efficiency, reduces risk, adds transparency, and maintains compliance. With this solution, marketers, sales representatives, product strategists, attorneys, and compliance professionals are able to collaborate in ways never before possible.”

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Rick Grashel,
CTO at Red Oak



THE SOLUTION

Product Strategists upload their presentation slides in AdMaster, which kicks off a compliance review and approval process. Once approved, the content gets pushed automatically into Synthesis and “tagged” based on the meta-data assigned to the slides during the upload process. These tags drive permissioning and enable the appropriate sales teams to access the right content for their different distribution channels and regions.

With this solution in place, salespeople across the globe can log in to access only the *relevant* and *approved* content for their distribution channel. They have the ability to use stock presentations or create custom presentations using the slides in the library. Synthesis provides the compliance control to ensure custom presentations are created within certain business and compliance rules (disclosure inclusion, grouping, ordering). Every sales presentation that is created is automatically checked back into AdMaster and receives a unique approval “code” and then securely stored for tracking & auditing purposes.



Presentations are stamped with an approval code in Synthesis and sent back to Red Oak for Storage.

The result is more velocity in the sales process, providing distribution teams with a way to create compliant, customer-centric presentations very quickly with minimal risk.

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Results

This integrated solution has improved the communication and collaboration between Product Strategists, Sales, and Compliance teams globally. This has led to more velocity in the sales process, providing distribution teams with a way to create compliant, customer-centric presentations very quickly with minimal risk.

This technology-enabled workflow ensures that content is tagged, approved, and made available to the correct distribution team, which offers a “single source of truth” for sales presentation content. Sales groups can easily and quickly access the right content and create custom and compliant presentations for each client interaction.

All presentations created by the sales team are approved and automatically stamped with a unique identifier for proper tracking, then stored in AdMaster for auditing purposes. This has greatly reduced the time Compliance spends reviewing and approving marketing material, and greatly improved risk management.

Quick facts:

- *More velocity in the sales process allows distribution teams to conduct more meetings.*
- *More personalized, client-centric presentations allows distribution teams to provide a better sales experience.*
- *More meetings and opportunities turn into new business.*
- *More control over content creation and distribution minimizes risk of non-compliance.*



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