



Overview

Company

One of the top 5 global managers by AUM.

Challenge

1. Enhance sales productivity.
2. Transition distribution to digital channels.
3. Reduce operating costs.

Solution

A fully automated, scalable platform ensuring high volumes of consistent market-ready content delivered to multiple distribution channels, and providing full support for digital distribution.

Benefits

- Product marketing information available via multiple digital channels.
- Digital content consistent with traditional distribution channels at all times.
- Increased effectiveness and efficiency of regulatory compliance.
- Sales productivity enhanced
- Operating costs reduced.
- Infrastructure costs reduced.

Global Investment Management

How a global investment manager implemented a new system to enhance sales productivity, transition distribution to digital channels, and reduce operating costs.

The Business Scenario

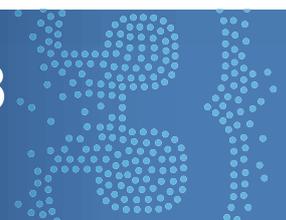
This client is one of the 5 largest investment managers in the world, with more than \$1.5 trillion in assets under management, offices in 20+ countries, and investment products managed in 10+ separate boutiques.

Managing the distribution of product information on this scale to sales teams, clients, potential investors, 3rd-party distributors, platforms, and financial advisors is an enormous challenge. Ensuring that the right information is delivered via the right distribution channels to the right audience at the right time is an extremely complex process.

The client needed a solution that would enhance sales productivity and improve the quality of product information on a global scale in a cost effective way, ensuring compliance with increasingly demanding regulatory guidelines in multiple jurisdictions. The solution needed to provide full support for the distribution of content via digital channels while continuing to provide full support for traditional channels.

“iPlus has allowed us to extend the service we provide to our sales teams, fund managers, consultants and customers, all while saving a great deal of money.”

Global Head of Investment Information Services



Solution Overview

The iPlus solution is deployed using a SaaS model. Product and fund information is generated by the client. It is stored in the iPlus repository as discrete components of approved content that can be included in traditional factsheets or distributed separately via digital channels such as interactive fund centres and investment advisor platforms.

A full factsheet production service is provided by integrate working with the client's off-shore team. The client uses the content in the iPlus repository to populate the information in its fund centre.

Full audit trails maintained across all production activities (changes to text, data and designs) and all distribution activities (changes to tagging, grouping and channels). Full traceability for corrections and investigations.

Production is not tied into specific data vendors; distribution is not tied into specific channels.

Business Benefits

Automation of the production of fund factsheets and the distribution of market-ready information to sales teams, portfolio managers, consultants, and customers resulted in reduced cost, enhanced sales productivity, and increased efficiency of compliance processes.

Product information provided as contextualised data, content snippets, or complete documents for distribution via web and mobile channels.

Sales teams able to leverage mobile platforms in the sales process.

Full control over product information distributed via 3rd-party channels.

Market-ready content produced on a monthly basis for 2,400+ product documents and factsheets, for 200+ funds and 1,000+ share classes, distributed across 15 jurisdictions and in 13 languages.

Operating costs reduced by 50% on initial implementation. Following implementation, the number of outputs has doubled every 18 months but operating costs have remained flat.

Outsourcing the production of marketing information to integrate further reduced operating costs by 25%.

Infrastructure costs reduced by 40%.

To find out more about how iPlus could enhance sales productivity and the customer experience in your business

Email us at:

enquiries@integrate.co.uk

Visit our website:

www.integrate.co.uk

Call us on:

+44 (0) 1926 889 199



integrate (Integrated Publishing Solutions Ltd.) was established in 1996, from roots in multi-channel publishing.

We were pioneers in database multimedia publishing and Java application development, with milestones such as the world's first multimedia encyclopedia, The Hutchinson Multimedia Encyclopaedia and the UK's first large scale Java application. We developed the Interactive Communication Engine (ICE), a platform to enable rich interaction between Java enabled devices.

Over the years we have developed solutions for a wide range of clients in Europe and North America across Financial Services, Manufacturing, Legal and the Pharmaceutical sector.

integrate is a privately owned company with all equity held by those who work for the company.

