

FACTSHEET REBRAND

NORTH AMERICAN COMMINGLED FUNDS

WWW.INTEGRATE.CO.UK

CLIENT

US Investment
Manager

MARKET

Financial Services

SOLUTION

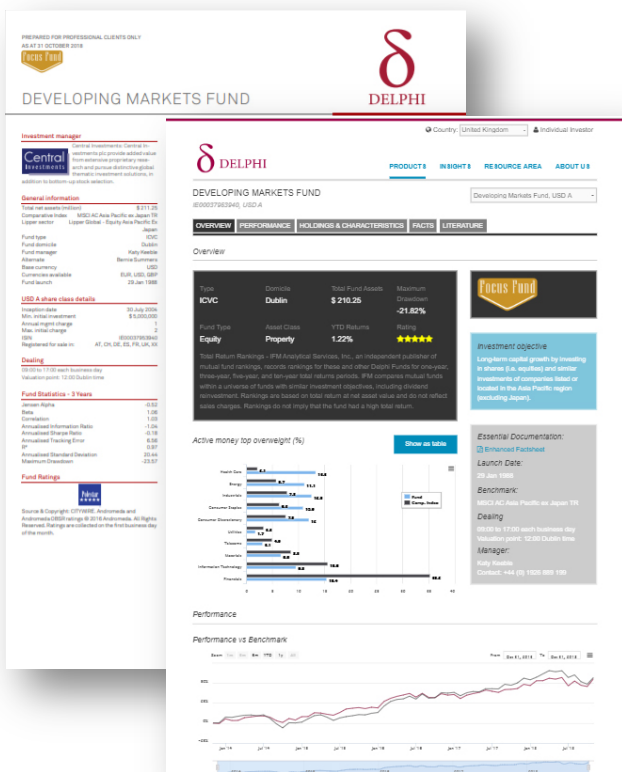
Automation

SERVICES

Transformation

BENEFITS

↑Functionality. ↓Costs.



CLIENT CHALLENGE

One of the industry's top 10 investment management companies, with more than \$1.9 trillion in assets under management, needed to transform their North American commingled fund factsheets.

The teams were manually producing their content using Adobe InDesign with multiple unstructured data sources. A transformation project was launched to automate the marketing collateral as part of a corporate rebrand.

With help from Integrated Publishing (IPS), they are now providing quarterly factsheets through a structured repeatable process. Working closely with the business, IPS developed a digital solution that automatically generates fund factsheets in-line with corporate branding guidelines.

The solution streamlined all the manual data-sources into one master repository. The factsheet templates created included on-the-fly chart generation and dynamic feeds to populate both print and web.

A full compliance workflow is providing peace of mind that all the factsheets are registered US Schemes compliant.

DATA MANAGEMENT

Our solution integrated over a dozen unstructured data sources into one master repository. New fund factsheet templates were created to replace the legacy Adobe InDesign files.

BRANDING TRANSFORMATION

The client content was updated to comply with the new corporate branding with print perfect precision. Time consuming legacy chart generation was replaced by our on-the-fly generation.

DIGITAL DISTRIBUTION

The client had separate teams managing multi-channel factsheet distribution. Now everything is done with a single click of a button. This has allowed the team to focus on more value-added marketing.

50+

QUARTERLY
FACTSHEETS

20+

BRAND
GUIDELINES

10+

DYNAMIC
CHARTS

6+

CONTENT
DISTRIBUTION



CLIENT BENEFITS

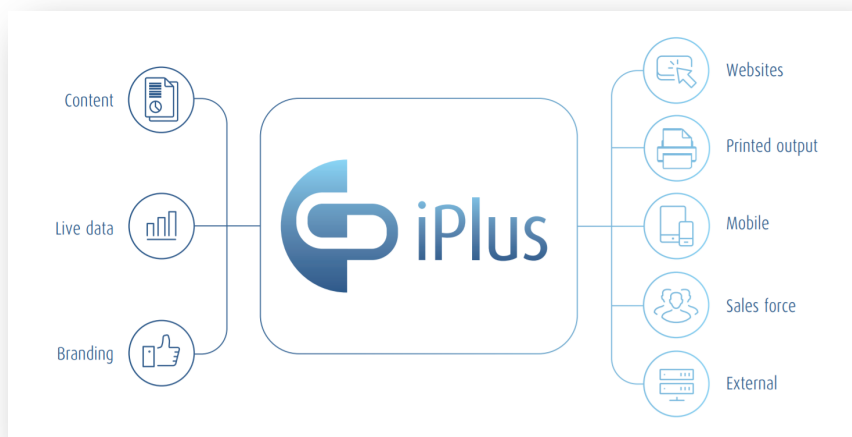
- UPGRADED MODERN FACTSHEETS
- MULTICHANNEL DISTRIBUTION
- REUSABLE CONTENT TEMPLATES
- UNIFIED MASTERDATA MANAGEMENT
- REDUCED DATA ERROR RISKS

OPERATIONAL
STATISTICS

↑ **400%**
PRODUCTIVITY

↑ **50%**
TIME SAVING

↓ **50%**
DATA ERROR



LET'S CONNECT

TESTIMONIAL

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Global Head of Investment Information Services

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