

FACTSHEET AUTOMATION

TOP 10 INVESTMENT MANAGEMENT FIRM

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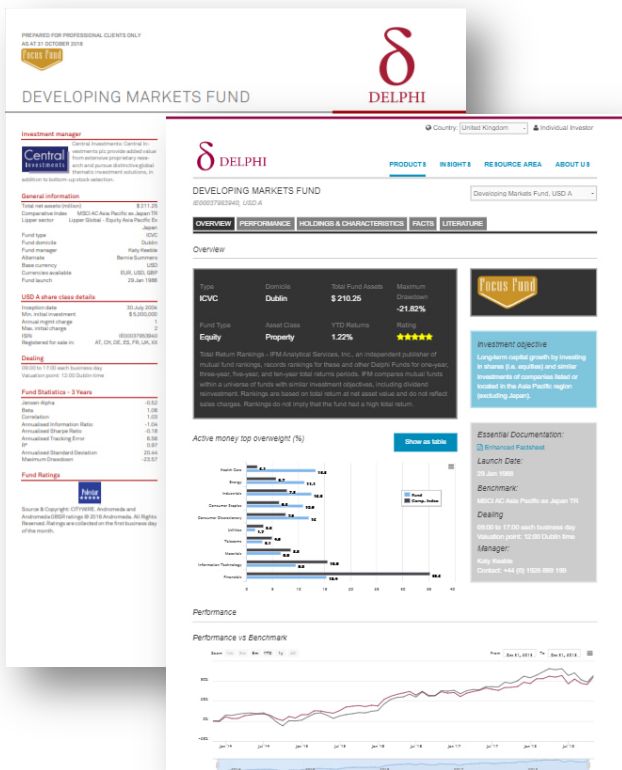
CLIENT
BNY Mellon

MARKET
Financial Services

SOLUTION
Fund Factsheets

SERVICES
Automation

BENEFITS
↑Productivity. ↓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 provide accurate financial information quickly and easily to clients and prospects through web, print and distribution channels.

Due to the scale of the data challenges, the company struggled to keep its fund factsheets, and digital channels up to date and readily accessible. With factsheets being a key source of information and essential part of marketing, a transformation project was launched.

With help from Integrated Publishing (IPS), Solutions they are now providing thousands of fact sheets through a much easier process. Working closely with the business, IPS developed a digital solution that automatically generates fund fact sheets with a more professional appearance. The solution generates dynamic content to bring web data to life; helping meet the interaction requirements of modern investors.

And to top it all off, a full compliance workflow is providing peace of mind that all the factsheets are compliant on a global scale.

DATA MANAGEMENT

Our solution integrated over a dozen data sources into one master repository. This enabled faster production times and smoother processes for the client to produce their monthly fund factsheets.

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.

SYSTEM COMPLIANCE

As one of the first cloud offerings, our solution underwent thorough client review. A comprehensive compliance and technology risk assessment ensured the highest software compliance assurance.

2,000+

MONTHLY FACT SHEETS

200+

INVESTMENT FUNDS

1,000+

SHARE CLASSES

15+

GLOBAL LANGUAGES



CLIENT BENEFITS

- UPGRADED MODERN FACTSHEETS
- DIGITAL INFORMATION ON WEB
- INCREASED SALES PRODUCTIVITY
- MULTICHANNEL DISTRIBUTION
- REDUCED COMPLIANCE RISKS
- REDUCED OPERATION COSTS

OPERATIONAL STATISTICS

↑ **800%**
PRODUCTIVITY

↓ **50%**
COST SAVING

↑ **12+**
DISTRIBUTION CHANNELS

TEAM PRODUCTIVITY

By using a more robust and responsive cloud hosted solution, the client is able to create factsheets for both web applications and print output much more quickly, while reducing errors and minimizing risk. The platform empowers the investment team to manage ongoing document production without needing to involve their internal IT department.

DIGITAL INFORMATION

Everything is componentized and re-usable. Fund information is provided as contextualized data, content snippets, or complete documents for distribution via web and mobile channels. This allows sales teams able to leverage mobile platforms in the sales process; and easily integrate within marketing automation and CRM tools (e.g., Salesforce)

GLOBAL TRANSFORMATION

Historically the client created a limited set of fund factsheets in English only. With the help of IPS automation, the content created has multiplied by 10 times and integrated into the wider global digital distribution ecosystem. The content is created once and shared everywhere. The solution is scalable to support a long term strategic roadmap thru to 2022.

LET'S CONNECT

TESTIMONIAL

"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

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or visit our website at **www.integrate.co.uk**