



Improving Investment Management Marketing

A BridgePoint Case Study

THE SITUATION

Our client’s quarterly delivery of investment performance and marketing collateral was not meeting internal or external customer demands. Their goal was to improve the process to support a best-in-class offering, while also building the scale required to support future growth.

Key Facts Highlighting Our Client’s Challenge:

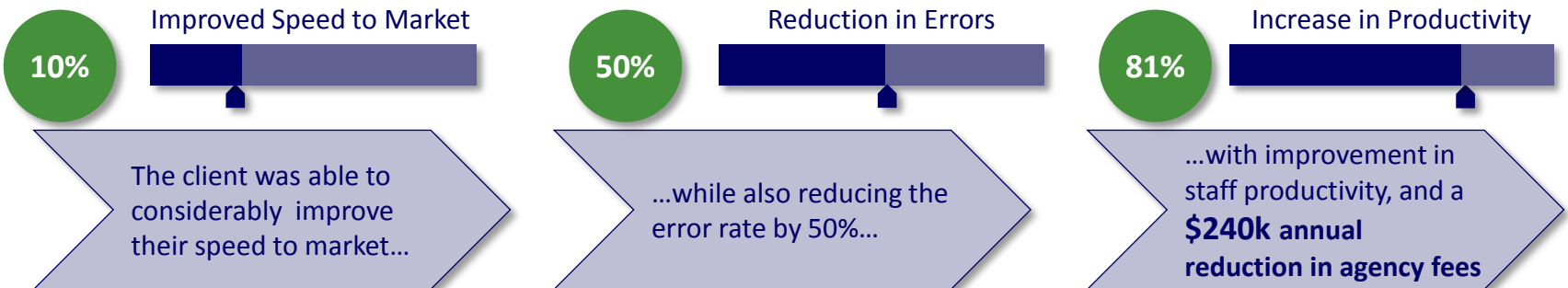
| | |
|--------------------------|--|
| Excessive delivery time | Lacking parity with industry standards |
| 92% manual process steps | High-cost solution |
| High data error rates | Inconsistent delivery abilities across investment products |

THE APPROACH

BridgePoint supported our client through a process improvement exercise to analyze their investment performance and marketing process. They identified a series of key issues with the variability of the inputs to the process and worked to clearly define investment policies, data sources and management methodologies. They also established clear governance protocols and worked to better set expectations of production procedures and timelines with all associated parties.

By leveraging the process analysis, the client was able to prioritize and sequence the investment collateral enhancements and process improvements with the highest degree of impact to best meet the needs of their customers.

THE BUSINESS RESULT



The client now delivers investment performance materials and marketing collateral on par with industry standards while improving consistency, accuracy and quality.