



INCREASED MARKET AND BRAND EFFECTIVENESS Brokerage Firm Case Study

One of the nation's largest and most respected asset management companies, offering a range of products and services to individuals, corporations, and institutions, including mutual funds, management for institutions, hedge fund products, and qualified retirement plans.

BUSINESS CHALLENGES

Provide secure passage of credentials from customer's intranet to determine which items can be viewed by an individual based on their certifications.

Allow financial advisors in the field to order branded collateral.

Print must be cost-effective, since customer bears a portion of the cost.

Streamline ordering process for all collateral.

Better manage brand consistency.

Seamlessly execute distribution and mailing at the time of transaction.

SOLUTION

A fully integrated web-to-print site that allows versioning of templated material, ability for one-to-one direct marketing, and fulfillment of a small number of inventory items.

RESULTS

Financial advisors can order books for seminars, meetings, etc. through the same system, while employees have centralized access to the fulfillment solution.

Financial advisors now have access to company-approved, branded, high-quality, consistent collateral.

Field has the ability to quickly and easily execute directed marketing efforts.

Direct mail solution uses variable data printing to provide one-to-one marketing, customized specifically to the individual.