

Increasing Marketing Impact for a Global Asset Manager



Successful marketing activities depend on an efficient and effective system for key tasks like knowledge management, content generation, customer engagement and impact analysis, with cross-functional access that enables all stakeholders to leverage the information. A large-scale investment manager with more than \$500bn assets under management engaged Evaluesserve to develop a target operating model for its marketing team that would enhance their operational efficiency, marketing effectiveness and overall customer experience.

Client

Marketing team of a large-scale, global asset manager

Industry

Asset management

Evaluesserve Solution

Evaluesserve conducted a diagnostics workshop with client teams to evaluate and document the 'as-is' state. Our experts discussed the client's expectations around the target operating model, including future scalability, interoperability, reliability, and other parameters.

A core team of process consultants and subject matter experts from Evaluesserve uncovered primary pain points and benchmarked client processes against industry best practices. Improvement areas were identified and further prioritized to focus on those with the potential to yield the greatest results within the client's existing infrastructure setup.

The solution design included specific recommendations on process improvements and automation opportunities. All recommendations were supported by a client benefits framework and a business case to facilitate the client's decision-making process.

Evaluesserve combined process consulting with its strong asset management domain understanding to create a best-in-class solution underpinned by its unique **mind+machine**TM approach.

The client's strategic objectives:

- **Streamline the marketing function**
- **Digitize content production process, incl. automation of routine tasks**
- **Create a new analytics framework**
- **Enhance digital footprint and build new channels for customer engagement**



Evalueserve's Agile D3 Framework

Evalueserve leveraged its proprietary process consulting framework, called Agile D3, to study the current process and business requirements, and design an optimized target operating model.

Benefits Achieved

Evalueserve designed a central workflow system, based on its proven RMS architecture, to provide the following benefits:

- Real-time tracking of documents across the process flow
- Automated data validations
- Streamlined quality control process
- Central knowledge repository for all stakeholders, including the sales team
- Automated MIS reporting to track utilization, productivity and other KPIs

Process reengineering and automation initiatives delivered the following direct benefits:

- Immediate 20% reduction in effort required to deliver the same volume of work
- Turnaround time for quarterly delivery cycle reduced by ~15 working days

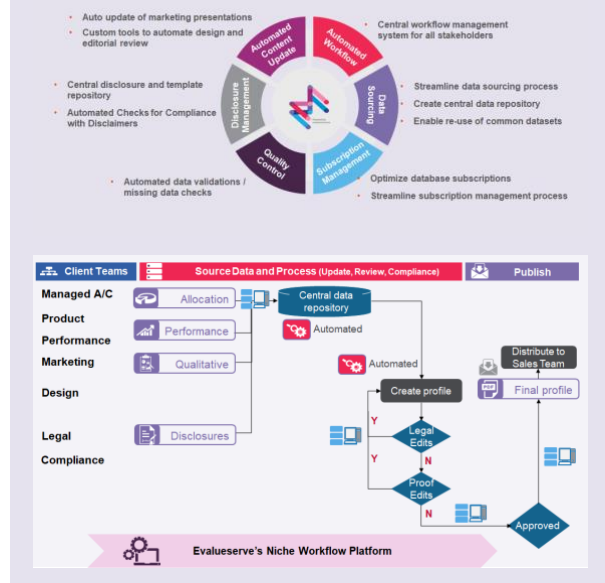
A structured framework was created for advancing measurement and effectiveness of marketing initiatives, encompassing:

- Assessment of ROI of marketing initiatives to support informed decisions
- Establishment of a framework for customer segmentation and personification
- Creating plan to enhance overall digital footprint and new channels for customer engagement

Recommendations

- Tactical automations – immediate benefits with minimal cost implications and IT/compliance dependency
- Streamlined data sourcing process
- Central data repository to automate creation of marketing collateral
- Central workflow system including document lifecycle management
- Redesign processes to reduce overall turnaround time and effort
- Optimized database subscriptions

Figure 1: Evalueserve Recommendations



Evalueserve – powered by mind+machine

Evalueserve is a global professional services provider offering research, analytics, and data management services. We are powered by mind+machine – a unique combination of human expertise and best-in-class technologies that use smart algorithms to simplify key tasks.



For any other information about Evalueserve and its services:
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