

Leading Financial Services Company

A leading US investment banking firm implemented full service print and document management, increasing ROI through vendor consolidation, rigorous security protocols, flexible run rates, and decreased distribution costs.

The Business Challenge:

The investment banking firm, which specialized in mergers and acquisitions, was juggling a high volume of diverse print needs—from brochures to proposals to investor prospectuses—with tight deadlines, heightened security requirements, and meticulous quality and accuracy standards. The firm was struggling to manage all of its collateral with the high levels of quality and efficiency its clientele deserved.

The firm knew it could streamline collateral management if it could find a single partner to centralize print and distribution processes, standardizing quality and handling assembly and mailing. But it was also looking for a partner that could help implement security protocols to maintain and ensure strict confidentiality for sensitive client financial data and transaction details.

The Customer

- Investment Banking Firm
- High-end clientele (PE firms, bankers, investors, attorneys)
- Wide variety of sensitive materials

At Stake:

- Security requirements
- Budget control
- Quality standards
- Tight deadlines

Why OneTouchPoint:

OneTouchPoint's full-service approach to print and document management provided a true single-source solution for the firm. With complete digital and offset print capabilities, full-service bindery, fulfillment and distribution, mail, as well as its technology offering, U.Connect, a platform that enables end-to-end management of marketing campaign execution from production to distribution—OneTouchPoint accommodated all types of projects and provided the quality, quick turns, and security requirements the investment banking firm needed.

Central Control

All of the company's assets were secured within a single platform, OneTouchPoint's U.Connect, ensuring integrity, quality, and color consistency across all assets, whether they were produced in a digital or conventional environment.

Security and Confidentiality

OneTouchPoint's security protocols, certifications and commitment to strict confidentiality gave the firm confidence that sensitive client financial data and transaction details would be kept safe and private.

Accuracy Standards

The company's stringent accuracy standards sometimes require last-minute changes and additions based on late-breaking financial reports, and OneTouchPoint is able to accommodate, often swapping out pages while on press.

Streamlined Costs

Flexible run rates allow the firm to minimize waste and standing inventory by printing as few as 5 or as many as 2,500 pieces, and OneTouchPoint's adept assembly and kitting services and in-house mailing facility have greatly reduced nationwide shipping costs.



Solutions and Results:

OneTouchPoint now manages production, kitting, and delivery for the investment banking firm's wide variety of personalized, up-to-the-minute print projects, ranging from marketing brochures to documents containing highly sensitive information.

With OneTouchPoint, brand decision-makers can make informed decisions about how to best streamline dynamic, time-sensitive processes to maintain high quality, accuracy, and security standards while minimizing wasted time, materials, and costs. OneTouchPoint's solutions empower clients to order what they need when they need it, with the confidence that it will arrive accurate and on time.

Streamlined Speed and Service

Where competing providers could offer only third-party solutions, OneTouchPoint brought all of the firm's collateral management needs under one roof, making asset juggling a thing of the past and reducing the privacy risks, errors, and delays that come with manual management practices.

Whether a firm needs to get a million direct mail pieces fulfilled or submit highly customized, confidential investment materials to a handful of clients, financial services leaders can rely on OneTouchPoint's team to ensure the flawless execution of every client communication initiative—from printing to fulfillment, kitting, packaging, and mailing, with order management and warehousing support, all following stringent security protocols and with no user intervention required.

Form. Meet Function.

OneTouchPoint helps brands and organizations marry form and function with beautifully-crafted marketing assets, produced at scale with purpose-built technologies and managed services.

OneTouchPoint's expansive and geographically-dispersed facilities cut production and shipping costs. At the same time, integrated services and decades of domain experience can meet the needs of the entire marketing supply chain through a single touchpoint. U.Connect helps centralize control of materials and our security protocols and commitment to strict confidentiality give users peace of mind that sensitive financial data and transaction details are safe with OneTouchPoint.

Find out why more than 3,000 innovators in manufacturing, franchise, retail, healthcare, and financial services choose OneTouchPoint for branded customer engagement and supply chain management.

Contact OneTouchPoint Today

Visit 1touchpoint.com or email info@1touchpoint.com.