

Case Study

Financial Services Company



Investment Banking Firm

KEY OBJECTIVES:

- Streamline print services while maintaining stringent quality and brand standards
- Centralize print and distribution processes
- Create a secure, single source of truth for all marketing assets

Business Challenges and Strategy

The investment banking firm, which specializes 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, standardize quality and handle assembly and mailing. But it was also looking for a partner that could help implement security protocols to maintain and ensure strict confidentiality for PII sensitive client financial data and transaction details.

Strategy, Goals and Results

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, while maintaining PII compliance and security requirements the investment banking firm needed.

Central Control

All of the company's assets were secured within a single platform, 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. At times this requires OneTouchPoint to make changes after the assets have moved into the print stage, which the team is able to accommodate with flexible technology and unmatched service levels.

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.

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.

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.

SHORT-TERM GOALS:

- Brand governance; ensure brand integrity across channels with centralized hub
- Leverage tech-enabled controls to:
 - Streamline printing, kitting and distribution
 - Ensure accuracy, quality and security
 - Minimize inventory waste
- Collateral management vendor consolidation

LONG-TERM GOALS:

- Reliable, consistent quality for all client communications
- Improved speed to market
- Reduce/eliminate significant internal administrative resources, and associated costs managing old processes

Technology Solutions Implemented

- U.Connect TCMA Platform capabilities leveraged:
 - Local marketing campaigns
 - Co-op dollars / MDF
 - Rights management | user access controls at dealer level
 - Fully integrated print, order management, fulfillment and mailing services
- U.Connect Digital Asset Module
 - Single source of truth for assets / campaigns
- U.Connect integrated IT system for inventory management and ordering
- Print Services
 - Client communication
 - Marketing collateral
- Order Management & Fulfillment Solutions
 - Kitting
- Marketing Services
 - Campaign management services