

Leading Financial Services Company Reduces Costs and Elevates Efficiency

Financial Services

Overview.

A financial services company specializing in mergers and acquisitions was struggling to manage a high volume of client communication and marketing materials while maintaining stringent quality and security standards. OneTouchPoint (OTP) provided a centralized solution through its OTP One platform, streamlining print and distribution processes, ensuring brand integrity, and protecting sensitive client data.

The results? Significant cost savings, improved accuracy, and heightened efficiency.

About the Organization.

This global financial services firm operates in the competitive mergers and acquisitions space, where meticulous attention to detail and client confidentiality are paramount. Known for delivering high-value, personalized service, the firm faced difficulties managing marketing collateral and client documents at scale, while adhering to strict privacy and quality requirements.

When the strain of juggling multiple vendors and processes threatened to compromise efficiency and quality, the company needed a partner who could deliver both streamlined operations and unwavering attention to security.

Business Challenges.

Handling a high volume of materials across numerous projects created several challenges for the firm:



Current Results.

- ✓ Operational efficiency & cost savings
- ✓ Security & compliance confidence
- ✓ Improved brand governance
- ✓ Enhanced process control

Key Pain Points:

- ✓ **Decentralized Processes:** Marketing and client communication assets were scattered across multiple vendors and systems, leading to inefficiencies in production and distribution.
- ✓ **Stringent Compliance Requirements:** Ensuring confidentiality for clients' personally identifiable information (PII) was a significant challenge.
- ✓ **Time-Sensitive Adjustments:** Financial documents required last-minute edits or additions, which intensified their reliance on flexible yet precise processes.
- ✓ **Cost and Inventory Wastage:** The lack of centralized asset control led to unnecessary inventory waste and increased costs.
- ✓ **Brand Governance:** Assets lacked consistency in color, quality, and compliance, undermining the firm's reputation.

The search was on for a single partner to address these challenges with an integrated and secure solution.

Strategy & Solutions.

OneTouchPoint provided an all-in-one solution to centralize and optimize the firm's print, asset management, and distribution needs. Their strategy included the following:

- ✓ **Centralized Asset Management:** OneTouchPoint implemented its proprietary OTP One platform, a single source of truth for all marketing materials. This ensured:
 - Brand consistency through centralized storage of digital assets.
 - Rights management to define user access control, protecting sensitive materials.
 - Secure workflows for campaign creation, approval, and execution.
- ✓ **Seamless Print and Distribution Services:** OneTouchPoint managed the end-to-end print and distribution process with the following capabilities:
 - Flexible Printing Solutions: From small-batch, high-quality print runs to large-scale production.
 - Kitting and Order Fulfillment: Kits tailored to each job's unique specifications, reducing shipping times.
 - Dynamic Edits: Accommodated last-minute content changes, ensuring timely, accurate documents without compromising security or quality.



Key Pain Points.

- ✓ Decentralized processes
- ✓ Stringent compliance requirements
- ✓ Time-sensitive adjustments
- ✓ Cost and inventory waste



Solutions Implemented.

- ✓ OTP One Platform
 - Brand Module
 - Create Module
 - Engage Module
 - Extend Module
- ✓ Print Services
- ✓ Order Management & Fulfillment

- ✓ **Heightened Security Protocols:** Given the sensitive nature of the firm's transactions, OneTouchPoint reinforced its commitment to data protection by implementing:
 - State-of-the-art security measures to protect PII and other confidential details.
 - Compliance with industry standards and certifications, offering the firm peace of mind.

Results to Date.

- ✓ **Operational Efficiency and Cost Savings:**
 - **Streamlined Costs:** Flexible printing reduced waste by tailoring production to specific order requirements, eliminating excessive standing inventory.
 - **Reduced Nationwide Shipping Costs:** Consolidated distribution saved time and money on logistics.
 - **Minimized Internal Resource Allocation:** The firm transferred time-intensive production processes to OneTouchPoint, significantly reducing in-house administrative burdens.
- ✓ **Enhanced Process Control:** OTP One served as a centralized hub, ensuring consistent quality and reducing delays associated with disorganized processes.
 - Fast, last-minute edits enabled the firm to maintain quality and accuracy standards, even as financial reports evolved.
- ✓ **Security and Compliance Confidence:** OneTouchPoint's robust security measures upheld the firm's confidentiality requirements, enhancing trust between the firm and its clientele.
 - Secure handling of marketing collateral reduced the possibility of errors or breaches.
- ✓ **Improved Brand Governance:** The firm achieved consistent quality across assets, such as client brochures and investor prospectuses, solidifying its brand reputation in the highly competitive financial services industry.

Positive Business Impact.

Through its integrated OTP One platform and full-service printing and distribution capabilities, OneTouchPoint delivered a tailored solution that addressed the firm's unique needs. From improved cost control to enhanced security, the partnership has enabled the firm to focus on what it does best—providing exceptional services to its clients.

By choosing OneTouchPoint, the financial services firm now enjoys streamlined operations, reduced costs, and consistent quality.

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

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