



CASE STUDY: CLIENT REPORTING

One of the largest banks in the world works with Xinn to focus on retaining assets in their private wealth management division.

Profile

An asset management company is focused on retaining assets within its private wealth management division. Xinn helps to ensure portfolio managers have the tools and resources to maximize time spent with clients and minimize time spent preparing for client meetings.



BNY MELLON

The Challenge

Over 500 portfolio managers and associates spent days preparing client presentations each quarter. Hundreds of marketing presentations were stored in disparate locations that forced portfolio managers to spend time combing through decks and selecting individual slides. Associates were downloading Excel financial reports from multiple systems, combining data into charts, and then copying charts onto the slides of client presentations. Inconsistent messaging and branding were an issue across resulting client presentations, resulting in a hit on the corporate brand. There were simply too many moving pieces.



The Solution

- Marketing presentations were sliced into individual slides and were stored and categorized in a single location, making it simpler for associates to find the right content for the right client.
- Data sources were identified and connected to, allowing Xinn to seamlessly pull data from multiple sources, format the data, and create customized, dynamic slides in a matter of minutes.
- A single Microsoft Powerpoint template was used across the entire wealth management division, ensuring consistent branding and messaging.
- A simple wizard interface was created to their specifications, allowing associates to customize every presentation to the meet clients' needs.

The Results



80% reduction in time spent creating client presentations.



Thousands of marketing slides, categorized and indexed, allowing associates to pick and choose slides with just a few clicks.



A seamless and secure process of extracting and rendering client data into Powerpoint and PDF presentations.



Enablement of fully customizable client presentations with the aid of a simple wizard interface.



 1.781.272.3300
 sales@xinn.com
 www.xinn.com

2400 District Avenue
Suite 300, Burlington
MA 01803