



PitchBook Automation for Financial Services

FlightDeck enables investment marketers and sales teams to create dynamic, highly personalized client presentations in minutes.

PitchBooks

PowerPoints

Proposals

Product Briefs

For investment marketers, managing a large library of presentation slides can be cumbersome. Changing data, disclosures, and branding makes updating slides difficult at best. Financial sales teams need quick access to approved slides with the right content and marketers need a better way to provide it to them.

With FlightDeck, marketing teams can easily create and manage a library of static and data-driven presentation materials that are current, compliant, on-brand and easily customizable by their sales teams.



Overview

Marketing, sales, and compliance will sing in harmony

While marketing, sales, and compliance teams have different needs and talents, they must work together to attract and retain assets, establish trust with clients, and stay ahead of the competition. FlightDeck makes it easy to create pitchbooks that are on-brand, highly personalized, compliant, and effective.

ADMINISTRATORS

Marketing

- Upload slides
- Import data
- Manage content updates
- Track usage
- Make approvals

Compliance

- Set controls
- Review & approve disclosures
- Audit & review content

Sales

END USERS

- Select from approved stock presentations, customize a stock presentation, or create a new custom presentation using a compliant library of static *and* dynamic slides (content and data are refreshed automatically)
- Easily update and reuse past presentations
- Print and/or send approved slide decks to a mobile device or tablet for presenting



Key Benefits



"FlightDeck reduces the time required to update and manage pitch materials by about 40% and reduces custom pitchbook production time by up to 70%."



SAVE TIME: Update and manage slides in half the time

Create, update, and manage a handful of templates and source files rather than hundreds or thousands of slide deck variations. Enable sales teams with presentation materials that are always up-to-date and compliant.



GAIN INSIGHT: Track, measure and audit presentation materials

Analyze user activity to measure, adjust, and improve your pitch materials. With key insight into usage, you can optimize your slide library to ensure the effectiveness of your presentations.



COLLABORATE: Streamline and simplify your team's workflow

Simplify your pitchbook management and creation process. FlightDeck can be configured to any desired workflow or approval process between marketing, sales, and compliance to eliminate unnecessary back-and-forth for QA and review.

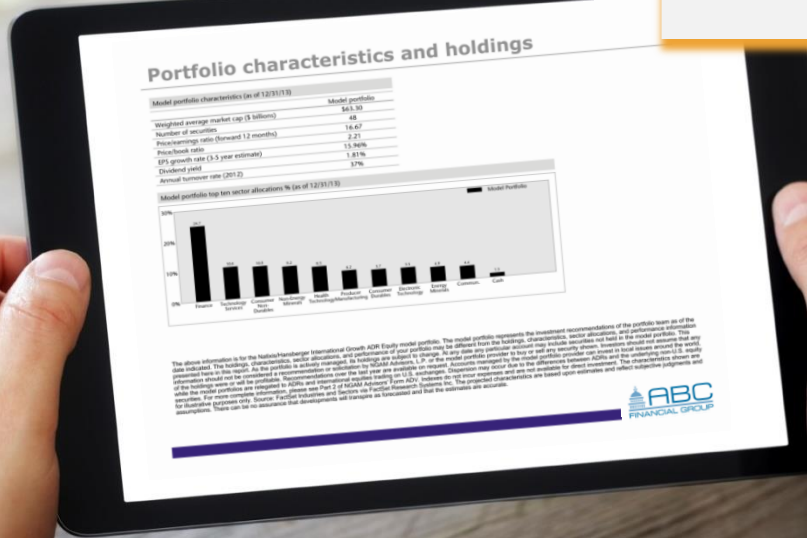


PROTECT YOUR BRAND: Always on-brand, accurate, and compliant

Slides are automatically refreshed upon receipt of new data, so you can ensure that your pitchbooks look good on the street, with all the right info in every presentation.



Key Benefits



EASY TO USE: Integrates with any CRM via SSO

FlightDeck is simple to use and intuitive. It integrates with your CRM via single sign-on, so sales people don't have to work between two different systems. FlightDeck can utilize your CRM data to populate relevant information into the presentation deck and recommend slides that are specific to each sales opportunity. Presentations are stored back to your CRM for your reference.



MOBILE COMPATIBILITY: Presentations sync to mobile devices

Through our partnership with SlideShark™, sales reps have the ability to automatically and securely sync presentations to their tablet or smartphone. Impress your clients with a live or broadcast presentation right from your mobile device. SlideShark features include slide annotations, timers, and presentation view with notes and more.



CLOSE MORE DEALS: Sales reps have more face-time with clients

On average, 59% of a sales rep's time is spent not selling. Give your sales team more face-time with clients with an automated pitchbook solution. Not only will they create more pitchbooks in less time, but the presentations will be more effective to help you attract and retain clients.



Case Study



SUMMARY

A private banking group within a major NY-based asset management firm uses FlightDeck to provide a pitchbook generation and sales enablement platform for 900+ sales reps.

THE OPPORTUNITY

A 3-person marketing department was seeking a better way to develop and maintain several hundred slides of presentation material used to pitch high net-worth clients. As a small team managing a large amount of content for a very large sales team, they were up against several challenges with their current process:

- Approved stock pitchbooks were shared on the firm's intranet, but seldom used by sales teams because they preferred custom presentations.
- This small marketing team couldn't accommodate all of the ad-hoc requests for customized presentations, so salespeople were creating their own custom pitchbooks.
- Pitchbooks created by salespeople lacked the oversight to ensure compliance with firm and regulatory standards.
- Pitchbooks created by salespeople did not always accurately reflect the company's brand according to marketing's standards.



Case Study, Cont. A three-person asset management marketing team supports 900+ sales reps with FlightDeck.

THE SOLUTION

FlightDeck allows the field sales force to configure and customize their own presentations within the bounds of automatically-enforced business rules/restrictions.

- With a FlightDeck solution in place, the marketing team can focus on content updates. This includes refreshing materials on a regular basis, maintaining the organization of topics and content, updating usage rules, and editing and approving bios of the sales team.
- Applicable disclosure content is automatically included.
- Restrictions on slide usage, ordering and other business rules are automatically enforced.
- Sales reps are led through a simple wizard to preview and select materials by topic for a specific client presentation.
- Approval by a manager is automatically triggered when applicable.
- New and updated slide content is automatically and immediately available to users (sales reps).
- Content usage analytics are readily available in system reporting.

THE RESULTS

A marketing team of three people is now effectively supporting nearly 900 sales users in 20 branch offices. The field sales force is producing and using several hundred custom presentations each month, all with compliant, approved, and current materials.



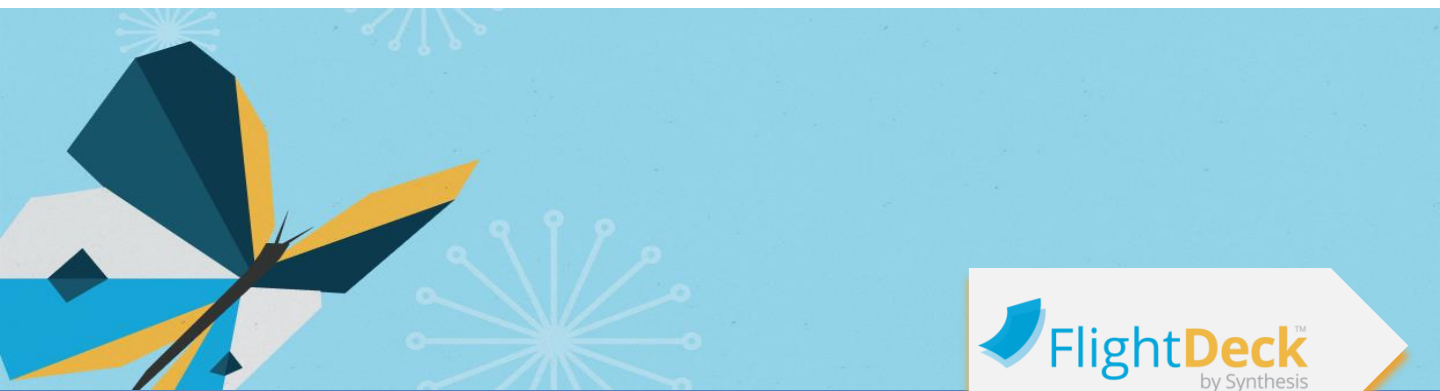
A technology partner you can trust

Synthesis is a financial services technology company that provides SaaS marketing solutions to asset and wealth managers, retirement plan providers, TAMPS, hedge funds, and other financial services organizations.

Our technology platform offers highly flexible content management, data management, reporting, and publishing features that allow marketers to automate the production of fund fact sheets, pitchbooks, website content, commentaries, performance charts and graphs, e-newsletters, and other marketing assets. We offer a depth of industry experience in automating marketing communications and our platform is renowned for its ability to adapt to a wide range of complex and evolving communication needs.

We set ourselves apart by operating with the highest level of integrity, providing best-in-class professional services in order to help our clients continually meet and exceed their goals.

That's why our client references are our most compelling sales tool.



820 West Jackson Boulevard, Suite 200
Chicago, IL 60607
(312) 948-4949 | www.synthesistechnology.com