



100% accuracy and reduced time to market

CHALLENGES

To generate highly personalized Quarterly Investment Reports for their customers, this financial services company turned to the expertise at Universal Wilde. The client threw down the gauntlet to reduce time to market while producing with 100% accuracy, making sure each personalized report got to the right person.

SOLUTION

Universal Wilde developed a solution leveraging Dynamic Document and Bar Code Matching technologies to produce with 100% accuracy, a personalized Quarterly Investment Report for each investor.

Every quarter, our client simply uploads data files into Xccelerate™, our state-of-the-art communications platform. Programmed business rules and Dynamic Document technology is used to personalize the investors Quarterly Investment Report with information, charts and graphs based on the performance of their fund(s). Each page is validated during the process and bar code matching technology stops the equipment upon a mismatch.

RESULTS

- 100% page level integrity
- Cost savings from process improvements
- Increased relevancy for customer engagement and satisfaction
- Reduced time to market from 1 month to 10 days (400k books quarterly)

This Fortune 500 Financial Services client is one of the largest investment management, mutual funds, and online brokerage companies in the world. They service over 20 million individuals and institutions worldwide.



FOR MORE INFORMATION

Contact your UW representative, or visit us at:
universalwilde.com