



CASE STUDY

FINANCIAL SERVICES FIRM

**Client**

A leading global investment management firm that offers high-quality research and diversified investment services to institutional investors, individuals and private wealth clients in major world markets.

**Challenge**

Following a staff reduction in the marketing department with a continued demand to maintain the same quality and volume of work, the client sought an outsourcing partner to support multiple marketing functions and deliverables. This included updating website materials, quarterly reports and presentation decks, and posting content to internal libraries. The client also required a dedicated team to cost effectively allow for resource scaling in response to the cyclical nature of the work.

**Solution & Results**

Dedicated Integreon creative services team with direct access into client's work environment for seamless execution operating under a flexible cost and staffing model.

As reliance on Integreon grew, the team quickly expanded from 2 to 24 operating from Integreon's Fargo and Manila delivery centers, and functioning as a true partner and extension of the client's marketing department. Ongoing scope of work includes:

- Production and execution of email communications - scheduling email campaigns, updating/creating custom email templates, and running analytics
- Support for large scale projects such as migrating web content to ensure ADA compliance, assisting with implementations of firm-wide brand refreshes, and aiding with web platform migration
- Fielding all MS Office related requests including the development and/or refresh of templates
- Ensuring all materials are brand compliant
- Documentation of processes associated with all assigned work

**Why Integreon****Flexibility**

- Ability to adapt and work within the client's existing processes, platforms, and proprietary tools.
- Ability to build out a team on or off shore as well and willingness to start with a smaller team that can flex up based on workload.

Transparency

- Clearly communicated range and depth of expertise, where training and specialty hiring was required, and the ability to pilot the solution to determine what worked, what needed improvement, and overall alignment.

This is what

true partnership

looks like.