

Research Publishing Solutions for a South Africa-Based Investment Bank

30+ client analysts supported

Editing, formatting & design, and translation

Exclusive 8-member Acuity team

CLIENT CHALLENGES

- The wealth management group of a financial major required editorial and formatting & design support for a range of market commentaries and strategy reports across asset classes; they extended support to other teams/processes, including translation (to Chinese language), within 2 years of starting the engagement
- Scope of work:
 - Editing (grammar, style, consistency, logic, and structure)
 - Formatting (exhibits and reports, ensuring they are in line with brand guidelines)
 - Designing (templates, publications, and marketing collaterals, including brochures, flyers, and presentations)
 - Collating and validating data; creating templates for pitchbooks, tearsheets, and factsheets and updating them every month
 - Translating the publications into simplified and traditional Chinese

OUR APPROACH

- Deployed 4 Formatting Specialists, 2 Design Specialists, 1 Editor, 2 Translators, and 1 Supervisor/Coordinator; the supervisor is the single point of contact for the client and responsible for scheduling work, and ensuring that quality and turnaround requirements are met
- Worked closely with the onshore team during a dry run of the publications and a charts database project; went live after the successful completion
- Redesigned daily, weekly, and monthly publication templates in line with branding guidelines
- Created documentation and SOPs by product to speed up the learning curve for new associates

IMPACT DELIVERED

- The onshore team has expanded its scope to include research support in other locations of the bank
- The Acuity team is fully integrated with the onshore analyst team, allowing seamless real-time support

About Acuity Knowledge Partners

Acuity Knowledge Partners is a leading provider of high-value research, analytics and business intelligence to the financial services sector. The company supports over 350+ financial institutions and consulting companies through a team of over 3,000+ subject matter experts who work as an extension of the clients' teams based out of various global delivery centres.

We empower our clients to drive revenues higher. We innovate using our proprietary technology and automation solutions. We enable our clients to transform their operating model and cost base.

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