

Sales & Marketing Literature Review Support for US-based Global Asset Manager

35%
reduction in cost of
complacency

Processed
efficiency savings

100%
timelines

CLIENT CHALLENGES

- » The client's Compliance team was facing bandwidth issues in managing the review of large volumes of sales and marketing literature
- » The client wanted support for the newly setup Compliance team in the UK in reviewing sales and marketing literature
- » Acuity Knowledge Partners was selected to enhance the client team's bandwidth by handling labor-intensive tasks such as reviewing sales and marketing literature

OUR APPROACH

- » Provided a dedicated team to provide support across multiple tasks, including marketing material review
- » Reviewed marketing material for US/EMEA regions
- » Managed the complete process – from document retrieval, review, feedback, and communication with relevant teams to regulatory filing
- » Developed a detailed checklist for document review

IMPACT DELIVERED

- » Enabled client's two-member EMEA Compliance team to manage increasing volume of marketing material
- » Reduced cost of compliance by 35%
- » Improved process efficiency by enhancing the reviewing and reporting processes
- » Developed (and maintained) process documentation, including standard operating procedures (SOPs) and issue logs

About Acuity Knowledge Partners

Acuity Knowledge Partners, formerly part of Moody's Corporation, is a leading provider of bespoke research, analytics, staffing and technology solutions to the financial services sector.

Headquartered in London, Acuity Knowledge Partners has nearly two decades of transformation experience in servicing over 300 clients with a specialist workforce of over 2,500 analysts and delivery experts across its global delivery network.

We provide our clients with unique assistance not only to innovate, implement transformation programmes and increase operational efficiency, but also to manage costs and improve their top lines.

These services are supported by our proprietary suite of Business Excellence and Automation Tools (BEAT) that offer domain-specific contextual technology.

Acuity Knowledge Partners is assisted by Equistone Partners Europe, a leading private equity organisation that backs specialist growth businesses and management teams.