

Pitchbook standardisation for a US investment bank

4,000+ slides converted to new/standardised format

Consistent branding across sector and product groups

Significant time saving for junior and mid-level bankers, enabling them to focus on more value-added tasks

Efficient use of slides on the bank's centralised capabilities

CLIENT CHALLENGES

- » Required DTP support on formatting and standardising presentations and documents consistent with the bank's brand standards
- » Brand identity needed to be realigned
- » Brand identity was redefined after the bank had made some major acquisitions
- » Existing material needed to be standardised if it was to remain competitive
- » Bankers using various styles and formats in pitch material was diluting branding
- » Different tombstone formats were used in pitchbooks across groups

OUR APPROACH

- » The Acuity team analysed these challenges, and formulated and executed an effective solution without affecting the client's day-to-day workflow
- » The team set up a dedicated offshore presentation/design specialist team to standardise pitchbook material
- » Engaged in regular communication with bank staff for feedback and workflow management
- » Used generic slides across sectors/groups, enabling faster standardisation

IMPACT DELIVERED

- » Enabled client to maintain brand identity by standardising existing and new decks
- » Bankers could use the converted/standardised decks for building new pitchbooks
- » Maintaining a central repository of capability slides with updated information enables reuse by the bankers and ensures consistency across groups
- » Maintaining a central repository of tombstone formats, standardising the tombstone-enabled automation of the tombstone creation process

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.