

Investment Management Firm Automates Marketing Workflows and Boosts Productivity by 40%

The client lacked visibility into planned work and needed to transform their manual workflow process with controls embedded to facilitate work and reports. NEOS designed a future state and improved visibility into project and team member efficiencies.

Company:

Investment Management Company

Industry:

Financial Services

Line of Business:

Investment Management

Location:

U.S.A.

Challenge:

Lack of visibility into planned and projected work in a centralized location reduced ability to proactively plan and reprioritize work as needed

Services:

Business Process Design & Optimization
FutureWeekSM Rapid Process Design

Results:

Improved visibility into projects and team member efficiency

BUSINESS PROBLEM

The client acquired another company and struggled to implement change management tactics, consolidate workflow tools, and project management resources. Their marketing content creation process had no clear hand offs or processes to facilitate the work. The client needed a unified process that would show clear lines of ownership and work status.

ACTION TAKEN

NEOS conducted interviews to gather pain points around the client's organization construct. Applying proprietary FutureWeekSM methodology, NEOS facilitated multiple process mapping workshops to understand the current state while identifying needed improvements for each process flow. The NEOS team not only developed recommendations that align with the client's current workflow management tool, but provided key findings, clear explanations to resolve challenges, and a holistic approach to own the process. NEOS delivered:

- An inventory of pain points that revealed cultural division between the recently joined companies and an absence of awareness toward the level of effort delivered
- Documented current state process flows that identified handoffs and challenges
- A list of recommendations to improve flow and communication and better align all the five cross functional teams
- Individual 'wish list' of improvements team members would like to see throughout the process
- Future state mappings that included efficiency recommendations
- An Executive Summary that outlined the holistic approach to implement the five key drivers the client identified for NEOS to review against the workflow tool

THE OUTCOME

The client transformed a manual process and created an automated process to facilitate work across the five functional teams. The client was able to create visibility into incoming demand vs. resource availability so they could actively manage resources, understand the traceability and cost associated with different programs to manage and communicate. The automated enhancements increased the client's productivity by 40%.



FINANCIAL SERVICES



\$108B IN ASSETS



9 AFFILIATES



9 PRODUCT TYPES