

Empowering Agility in Ad Hoc Communications for a Leading Investment Firm

A top-tier investment management firm serving millions of clients nationwide needed a more agile, scalable way to manage ad hoc communications. From investor notices to policy updates, they were juggling hundreds of time-sensitive, one-off projects with limited flexibility and heavy IT reliance.

CLIENT

A Top-Tier Investment Management Firm

FOCUS

Streamline ad hoc project creation

The Challenges

The client's existing process for managing ad hoc mailings was highly manual and inflexible:

- **Over 260 Independent Templates and Projects** active at any given time
- **Heavy IT Involvement** required to update or launch each communication
- **Limited Flexibility** for marketers and business users to make changes
- **Slow Time-to-Market**, with some communications taking 3–4 weeks to deploy

This structure slowed down response times, strained internal resources, and introduced risks when urgent communications needed to go out quickly.

The Solution

O'Neil Digital Solutions introduced ONEdoc, a self-service module within the ONEsuite platform, designed specifically to streamline ad hoc project creation.

- **Key Elements: User-Controlled Campaign Builder:** Enabled business teams to build and launch mailings independently—without needing IT resources.
- **Dynamic Content Capabilities:** Allowed users to add copy, apply conditional logic, and manage variable data within a simplified interface.
- **Template Reduction:** Consolidated 260+ ad hoc projects into just two intelligent templates, each capable of supporting a broad range of scenarios.

This approach empowered business users to quickly execute compliant, professional communications without bottlenecks or IT delays.

The Results

By implementing ONEsuite, this prominent healthcare company achieved remarkable improvements:

 Reduced Complexity	260 Projects Consolidated into 2 Templates
 Reduced Workload	Launch Time Reduced from 3–4 weeks to a few hours
 Freed Resources	Freed IT Resources to focus on higher-priority initiatives
 Increased Agility	Increased Agility to respond to market and regulatory changes

Conclusion

By implementing ONEdoc, this leading investment firm replaced hundreds of isolated templates with a streamlined, self-service solution—reducing costs, increasing speed, and empowering teams to act with confidence. The result: faster, more flexible communication that meets the demands of a fast-paced financial landscape.

Get In Touch

Learn how O’Neil Digital Solutions can transform your financial communications.

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