

# 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:

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

## 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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