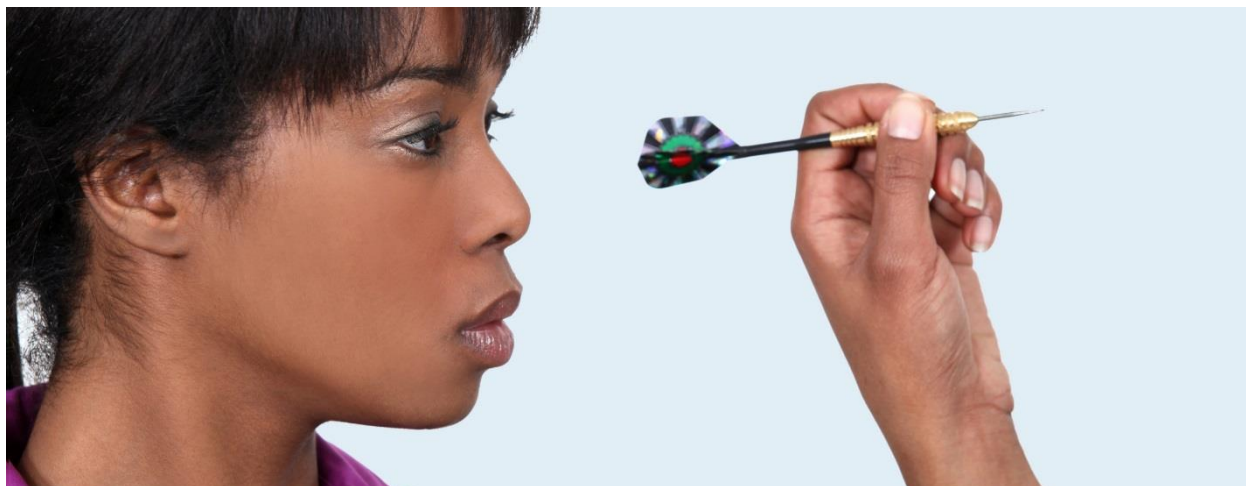


Enhance productivity for pitchbook creation via Pitchready



Investment bankers are involved in creating several pitchbooks in their daily business. However, traditional processes used for creating pitchbooks are slow, error-prone, and non-scalable. Our new product – Pitchready – has been developed with a clear understanding of the efforts that go into pitchbooks. This suite of PowerPoint-based productivity tools has been developed to make pitchbook creation efforts smarter and more efficient. Our case study illustrates how Pitchready helped a major investment bank streamline its pitching process.

Client

A major investment bank

Industry

Investment banking

Evalueserve Solution

Deployment of Pitchready, our automated optimization suite, which includes:

- **Logo Builder**, offering easy access to an Evalueserve-maintained repository of 50,000+ logos
- **Template Repository**, providing access to clean and formatted client templates in desired hierarchy
- **Tombstone Builder**, offering easy selection of deals and automated credential page creator
- **Desktop Publishing Toolkit**, offering a pack of 70+ commonly used PPT functionalities



Combine logos, templates and deal data to build standard pitchbook slides and marketing presentations far more quickly than with manual processes.

Business Impact

- Saved 95% of overall process time spent in applying logos for pitch presentations
- Tombstone slide creation time improved by 80%
- Enabled standardization of templates across user groups and offices
- Reduced formatting time by 50%

Business Challenge

Investment banks create large pitchbooks and management presentations on a regular basis. The process of curating content and developing artefacts involves several manual, repetitive, and time-consuming tasks, such as creating credentials slides and ensuring adherence to brand guidelines. These tasks can have a significant negative impact on bankers' productivity.

Our client was a major investment bank that was looking for technology to shorten its turnaround time on pitchbooks and presentations. Its junior analysts were spending many hours on manually searching, resizing, and placing logos; selecting templates; creating tombstone slides; and formatting.

Not only was the process far too slow and cumbersome, the bank was also facing competitive pressure to streamline and standardize its processes.

- **The Tombstone Builder** enabled bankers to create tombstones and credentials slides on the fly, from a repository of 2,500+ deals across 7 industry groups and multiple transaction types.
- **The Design Toolkit** helped to quickly format and finalize slides, in line with branding guidelines. Its features include slide library, master layout reset, auto TOC creator, image libraries (shapes, icons, infographics, diagrams, flags, maps), and extensive charting and formatting tools.

Benefits Achieved

As Pitchready was installed behind the client's firewall, it enabled users to access updated logos, templates, and other design elements locally from their network. That ensured a seamless process and added to productivity. Significant efficiencies were also achieved by way of 95% reduced effort in updating logos, 80% in tombstone creation, and 50% through automated rather than manual formatting.

Our Solution

We deployed Pitchready behind the client's firewall to significantly automate the process of creating standard slides.

Pitchready consists of a suite of functions that helps teams create pitch slides quickly and easily.

- **The Logo Builder** provided access to clean, transparent and updated logos in client-specific taxonomies from our own maintained repository of 50,000+ logos – it automatically resized and placed the logos within single or multiple placeholders or preconfigured templates.
- **A Template Repository** was developed to host the bank's standardized templates, which included ~500 templates across 7 industry groups and three geographies.

Evalueserve – powered by mind+machine

Evalueserve is a global professional services provider offering research, analytics, and data management services. We are powered by mind+machine – a unique combination of human expertise and best-in-class technologies that use smart algorithms to simplify key tasks.



For any other information about Evalueserve and its services:
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