

INSURANCE CASE STUDY

Leading Retirement Team Engages Synthesis and Mediafly to Improve Sales Messaging Consistency and Efficacy

INDUSTRY: INSURANCE
Iowa | 10,000+ employees



The Challenge

An American Holding Company for various life insurance companies and investment firms completed an audit of sales presentations in 2016 and found decks to be inconsistent with approved marketing messaging and off-brand. While marketing was spending time and energy to produce approved materials, further investigation into the problem revealed sales didn't feel the assets available to them were customer-centric and found it to be too time-consuming to find, share and build presentations. To maintain its status as the leading provider of retirement plans, the company needed a solution that would streamline processes to eliminate the creation of ad-hoc sales materials and ensure materials presented to prospective customers were relevant, personalized, and compliant.

The Solution

Together, Mediafly and Synthesis developed a holistic solution that would enable sales agents to create customer-focused presentations within the guardrails of marketing and compliance. Integrated with CRM and the company's compliance system, the new technology allows the company's 200+ Retirement sales reps to easily find and personalize content. Choosing from a library of hundreds of slides and dynamic content, reps can mix-and-match assets to create a customized sales presentation for each engagement. Once a deck is built, the system approves it for immediate use or routes it to compliance if new or unrecognized content has been added. Final presentations are distributed via the Mediafly application, tracked in CRM, and archived in the compliance system for a seamless and efficient workflow, meaningful insights into content usage, and improved auditability.

The Result

The Mediafly application provides a "single source of truth" for sales presentation content, inspiring confidence across the organization that the materials they are putting in front of clients and prospects is relevant, accurate, and compliant. Aligning Sales, Marketing and Compliance has improved process efficiency for the organization, resulting in increased sales velocity. Sales reps have significantly reduced the amount of time they're spending creating, reviewing, updating and managing presentation content and expect to see further improvements to sales productivity and close rates as a result of the new technology.

About Mediafly

Mediafly is a sales enablement technology company serving Fortune 1000 organizations worldwide. Its cross-industry expertise and proprietary Evolved Selling™ Solution gives brands the power to enhance sales engagement with their customers for improved buyer experiences and more deals won. **Contact Mediafly at info@Mediafly.com, or (312) 281-5175, extension 1.**

About Synthesis

Synthesis helps investment companies become more efficient, compliant, and customer-centric by automating data management, marketing operations, and sales enablement processes. Experts in investment data and content automation, the company has exclusively served financial services firms for over 20 years. **Contact Synthesis at info@snth.com, or (312) 948-4949.**



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