

Quark Publishing Platform™

Client: Global Asset Management Firm
Use Case: Financial Services: Asset Management Fund Marketing
Users: 200
Country: USA
Goal: Digital Transformation, Customer Satisfaction and Regulatory Compliance

GAM

Global Asset Management Company Structures Content to Improve Client Satisfaction, Reduce Risk and Accelerate Time to Market

This global asset management company manages billions of dollars of assets and serves customers in over 150 countries.

Challenge

One challenge which is faced by most global Fortune 500 companies is how to digitally transform while staying competitive. Today's customers demand immediate access to accurate and updated information across any number of formats and devices. At asset management firms, the brunt of this challenge often falls to the fund marketing team - and this one is no different.

Solution

The company is using **Quark Publishing Platform (QPP)** with **Quark XML Author**, the structured authoring plugin for Microsoft Word, to automate its content creation and omnichannel publishing processes.



Results

- Established a new, automated marketing production model relieving teams of manual work
- Automating the delivery of thousands of marketing pieces to multiple channels and output types
- Accelerated time to market for all marketing content
- Increased customer satisfaction
- Projected to save more than \$1 million over three years through business transformation

The VP of Marketing Technology & Strategy knew there had to be a better way of managing content creation and delivery at scale. The firm already had a robust approach to digital content management but needed a platform that could handle all fund marketing output – digital, print, PDF and Web.

The marketing function needed to transform its processes and systems in order to remain competitive. One priority was getting up-to-date and accurate content to market more quickly and across more channels. According to the VP of Marketing Technology & Strategy, “Getting content to market quickly is critical. There aren’t only competitive pressures but third-party investment research data providers that will publish information as soon as it’s available – and some of the providers might be digital-first. Clients say, if I can get it from them, why can’t I get it from you?”

Initial research with analyst groups Gartner and Forrester gave the VP a sense of which solutions could ingest data from multiple data sources, allow for componentized content creation and enable the automatic assembly of both for output and delivery.

The asset management firm chose Quark’s solution, which includes Quark Publishing Platform and Quark XML Author, a plugin for Microsoft Word that enables

non-technical authors – such as portfolio managers and commentary authors – to create structured content components in a familiar Microsoft Word environment. Content created in a structured format with Quark XML Author can be tagged with metadata to allow it to be stored, searched, updated, tracked and controlled within a central repository, where it can be reused on demand.

The VP says, “Because our authors now work in a Wordtype environment, the actual change management process was much easier due to familiarity. We also quickly got used to seeing content in components. We have a special view for reviewers that shows the copy in context of the final document versus how authors can view as components.”

Quark Publishing Platform is the central content repository that manages content components created with Quark XML Author. It also manages previewing, review and approval workflows and digital asset management throughout the content lifecycle. Based on rules created by the asset management firm, Quark Publishing Platform automatically assembles and delivers content in required formats, whether print, PDF, mobile apps or the Web.

“Is content automation worth the investment? The answer is absolutely yes. We expect to save \$1m over the course of three years as we go through our overall business transformation process and this is just the cost savings. On top of this we are positively transforming our client experiences.”

– Vice President of Marketing & Strategy



If a quark – in science – is the basis for all matter, then Quark – the company – is the basis for all content. The company revolutionized desktop publishing and today provides content design, automation and intelligence software for end-to-end content lifecycle management. Customers worldwide rely on Quark to modernize their content ecosystems so they can create complex print and digital layouts, automate omnichannel publishing of mission-critical documents, and analyze production and engagement insights for the greatest return on their content investments.

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