



OutSystems Platform for Pitchbook Generation



The
Client

One of the biggest wealth management banks in UK

Project Highlights

Objective:

- Pitchbook tool digitally empowers the Sales team to turnaround with quick, efficient and controlled sales presentations
- Pitchbook application effectively manages content so that customized presentations are always compliant and accurate

Business Processes Covered:

- Content owner governs the content and campaigns workflow through upload, update, Tagging, Grouping, Locking, Disclaimer association through the smart rule engine
- Pitch creator creates and manages their own presentations using pre-approved contents and campaigns. They can share, download, and publish the pitches
- Tool admin governs all the metadata management for the tool and configuration of rule engine

Business Challenges:

- They did not have any integrated system to track and manage all the content efficiently with necessary governance across geographic locations
- Being a wealth management organization, there are very critical mandates and rules for using correct content with all the necessary disclaimers. They didn't have any such a smart engine to address these needs

Projects and Technology

Solution Highlights:

Persistent's solution covers the below aspects:

- Tool allows to create a customer-centric, customized pitch ensuring all the business rules
- Presentation dashboard covers all the activities and actions around content as well as Pitchbook
- Pitchbook provide templates that help the sales team create presentations on the fly with minimal efforts
- Properly defined workflows, notifications and processes
- Multilingual support
- Reducing pitch generation time from few days to few seconds. This is achieved by an efficient .Net based Pitch generation engine

About Persistent Systems

Persistent Systems (BSE & NSE: PERSISTENT) builds software that drives our customers' business; enterprises and software product companies with software at the core of their digital transformation. For more information, please visit: www.persistent.com

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