

INVESTMENT FUND MANAGEMENT

KNOW YOUR CUSTOMER

Company Background:

One of Canada's largest investment fund companies helping over 1.3 million customers reach their financial goals.

Team Lead: Head, PMO

Teams on Solution:

- Print Production, Marketing, Creative Services, Communications, and Events
- Compliance and Translations
- Digital Experience and Digital Marketing
- Investment Fund Research and Analytics
- Assante Marketing



NET PROMOTER SCORE

“Overall, working with WNDYR was a positive experience.”

Likelihood to Recommend: 8.

UNDERSTAND YOUR CUSTOMER

Current Challenge:

- Disparate systems and manual processes preventing teams from effectively communicating, tracking progress, and identifying where bottlenecks occur
- Lack of a defined approval processes causing blockages
- Lack of visibility making managing key projects with multiple teams challenging

GOALS/SUCCESS CRITERIA

- Increase efficiency when creating marketing materials
- Unlock ability to track work requests and project progress
- Improve collaboration by defining processes to be used for key projects
- Improve resource allocation
- Increase solution adoption with Change Management, as previous attempts to introduce change have not always been well received

Get in touch with us to find out how we can take your teams to the next level today:



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