

FOR IMMEDIATE RELEASE

Assette Eliminates Need for Manual Updating and Delivers No-Code Solution for Asset Management Firms' Sales and Client Communications

BOSTON, M.A., July 22, 2021-- [Assette](#), a provider of sales enablement and client reporting software for the asset management industry, today unveiled new Smart Doc capabilities that eliminate the need to manually update reports and presentations and introduce a no-code approach to building sophisticated client and sales communications.

The Assette Smart Doc capabilities create automated versions of a firm's sales pitch books, factsheets, client reports, and other communications in a familiar Microsoft PowerPoint format. In these smart documents, the data fields on each slide are linked to the relevant data source. Information is pulled directly into the presentations and reports from the source through connections to leading data systems and qualitative data inputs. When a data point is updated at the source it automatically flows through a firm's communications. If customized information is needed, asset managers can quickly drag and drop new content onto the communication.

"Gone are the days of wasting countless hours copying and pasting data from performance and attribution systems," said Thusith Mahanama, Chief Executive Officer, Assette. "With Smart Docs, Assette has automated the creation and customization of sales materials and client reports with simple drag-and-drop capabilities, helping asset management firms to be more productive and improve the accuracy of information."

With Assette's Smart Doc capabilities an asset management firm can:

- **Create content quickly:** With Smart Docs, asset managers can create new content via a drag-and-drop interface. For example, in Assette, showing performance data for different periods, multiple strategies, or currencies is as simple as creating a virtual copy of the performance page and updating the data settings.

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- **Fix errors and update information consistently:** Once a data point is updated at the source, it flows through all documents. For example, if a research analyst receives their CFA designation, the firm updates the biography data in a single location and the change automatically appears in all documents that include a mention of the person.
- **Assign user permissions:** Because Smart Docs are pre-approved and can be locked to only allow appropriate editing based on role, the content users can change is controlled. A sales representative prepping for a new business pitch could quickly pick engaging slides from a standard presentation to customize their presentation. If any of the underlying slides are updated by marketing, the new content automatically appears in the custom book without additional effort.

Smart Doc capabilities are now available in [Assette software](#).

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About Assette

Powered by the industry's only Unified Data Engine, [Assette](#) enables asset managers to automate the creation, review and delivery of sales, client and portal communications. Assette runs on the Microsoft Azure cloud and improves productivity of client reporting and sales communications by 90% by integrating data and enabling faster, content generation, review, and sharing. Assette clients have more than 1 trillion in assets under management and include many of the top firms in the industry. For more information visit www.assette.com.

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