

**CASE STUDY** Nov 2013**Ivy Investment Management Company  
(f/k/a Waddell & Reed Asset Management Group)  
Overland Park, KS**

AUM: \$13B

**TESTIMONIALS****Brian Sullivan:**  
Vice President of

Institutional Client Service

Assette makes it easy for Marketing to provide customized reports to our clients.

**Meredith Leonard:**  
Client Service Analyst

Assette cut the time and resources needed to generate reports. Also, whenever we have questions, Assette's client service is very responsive.

**Background**

Waddell & Reed Asset Management Group, a division of Waddell & Reed Investment Management Company, provides investment management services to the institutional marketplace. Institutional assets under management totaled \$13 billion as of September 30, 2013. The firm began using Assette for report generation in January 2011 as part of the firm's ongoing efforts to provide top quality service to its clients.

**Solution: More Effective Client Communication**

With Assette, Waddell's institutional marketing department is able to integrate more analytics into client reports and deliver them more quickly to clients says Brian Sullivan, Vice President of Institutional Client Service. Assette's PowerPoint-based user interface makes it easy for marketers to modify the look and feel of reports, providing more consistency with the firm's other marketing materials.

Assette also enables Waddell & Reed to provide clients with greater report customization. Benchmarks and time periods can be modified with a few clicks. In addition, individual charts and even entire sections can be added or deleted based on client needs. Clients can specify delivery options, too, ranging from hard copy to email to retrieval from the firm's dedicated client website.