From Chaos to Control in 90 Days

ASSETTE

How one $120B AUM firm fixed their factsheet process in 90 days—without chaos, compliance risk, or waiting on IT.
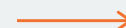
What It Looked Like Before Assette

Factsheets were built manually

Data arrived late, and often wrong.

Sales kept editing their own decks.

Compliance reviews slowed everything down.

Rebuilding the same content, over and over

Too many tools, not enough results

No time to improve— just survive the cycle

Compliance reviews slowed everything down.

Too many tools, not enough results

Everything felt duct-taped together—every single cycle.

IT gatekeeping simple updates

If that sounds familiar, keep reading.

How bad is it really?
Fill out the scorecard to find out

The Outcome:
More Control, Less Chaos

ASSETTE

In just 90 days, this $120B investment firm moved from spreadsheet-driven chaos to a fully automated factsheet process.

BEFORE	ASSETTE	AFTER
Manual data aggregation in Excel	→ Connected to live data sources	→ Data flows automatically into factsheets
Repetitive formatting and version confusion	→ Standardized templates formatting and versioning	→ Brand consistency and version control maintained
IT needed for every content update	→ Marketing empowered to manage content directly	→ No IT bottlenecks—Marketing owns the update cycle
New content built from scratch each cycle	→ Reusable data objects and templates implemented	→ Factsheet content reused across decks and reports
Struggled to scale without adding headcount	→ Automation scaled across more products and clients	→ Doubled output without increasing team size
Multiple weeks spent producing each factsheet	→ Manual steps replaced with automated data and template flows	→ Factsheets produced in hours, not weeks

Their marketing team took control—delivering brand-safe, compliant materials faster than ever.

"Assette centralizes our content creation process and empowers internal stakeholders to build effective client-facing presentations."

— Chief Marketing Officer, Investment Firm

Client Content Chaos Scorecard

~~Hours~~ Days spent waiting on data:	
~~Hours~~ Days spent formatting data:	
~~Hours~~ Days lost to compliance reviews:	
~~Hours~~ Days waiting on IT for customization:	
Number of last-minute slide edits before a meeting:	
Number of versions circulating at the same time:	
Number of vendors involved in your "automation" stack:	
Number of vendors actually automated entirely	
Do rogue Sales edits undermine your brand?	Yes No
Have you missed a reporting SLA in the last 6 months?	Yes No
Are you rebuilding the same content in multiple tools?	Yes No
Have you added headcount just to manage "automated" systems?	Yes No

If you're not proud of your answers... you're not alone.

There's a better way to manage client-facing materials.

CONTACT

Sam Genesky
Senior Manager, Sales Engineering
samuel.genesky@assette.com