

CONTENT AUTOMATION FOR FUND MARKETING

TRANSFORMING CONTENT. TRANSFORMING BUSINESS.

Creating and updating fund marketing content is an endless quarterly treadmill that drains marketing and distribution teams, leaving many asset management companies struggling to keep pace. With content automation, create reusable content components – narrative content, legal disclosures, tables, charts, images, videos, and more.

Content Automation for Fund Marketing dynamically assembles content – including the latest performance data – into a range of formats, all from a single source of truth. Deliver content to your sales team through the integrated sales content platform that includes predictive AI and analytics to ensure the best performing content is always being used.

The result is thousands of compliant fund marketing documents – pitchbooks, fund fact sheets, commentaries, profiles – created and updated automatically in seconds. Create unparalleled content experiences for clients and prospects in a fraction of the time, using significantly less resources.

BENEFITS

- Improved client experience
- Faster time to market
- Lower risk of compliance and regulatory violations
- Increased sales effectiveness
- Significantly less marketing resource drain
- Reduced localization cost and complexity



“Quark content automation challenges established file based approaches to managing and storing business content.”

– **Gartner.**

FEATURES AT A GLANCE

- Powerful authoring tools
- PowerPoint Smart Slide Decks
- Automatic content updates with Smart Content
- Fund data integration
- Sales content management and analytics
- Dynamic charts and tables
- Rules-driven disclosure insertions and updates
- Omni-channel delivery automation
- Translation optimization and automation
- Document cloning for new production cycles
- Enterprise-class technology
- Single repository for your marketing content

Feature Highlights

Powerful Authoring Tools

Smart content is created using Quark Author or Quark XML Author for Microsoft Word. The guided authoring experience makes it easy for subject matter experts to create, reuse and update content, all within the context of the specific fund they are writing for. No more copy and pasting between documents, and on-demand content previews enable authors to see how the content will look in each output format. Plugins for Microsoft Office applications such as Excel, PowerPoint and Visio enable easy storing and reuse of office content across fund marketing collaterals.

PowerPoint Smart Slide Decks

Bring Smart Content to Microsoft PowerPoint. Create new slide decks from centrally managed templates and reuse slides in multiple slide decks. You can also reuse tables, charts, pictures, videos and audio from the server. The platform keeps track of all content reuse so when the source components, such as performance data or even complete slides change, you can update all of the linked slide decks keeping all of your content up-to-date and compliant.

Automatic Content Updates with Smart Content

With Quark's unique Smart Content technology, content can be reused between documents and because each reused Smart Content component only exists once, you are always working from a single source of truth. If a reused content component changes – such as an investment philosophy, legal disclosure, chart or table – every document that uses that content can be updated automatically. Content reuse and automatic updating reduces authoring cost and improves consistency and compliance.

“WITH QUARK'S FULLY INTEGRATED MARKETING CONTENT PLATFORM WE CAN AUTOMATE THE PRODUCTION OF THOUSANDS OF COMPLIANT FUND MARKETING DOCUMENTS EVERY MONTH WITH LESS RESOURCES AND SIGNIFICANTLY REDUCED TIME TO MARKET”

- GLOBAL ASSET MANAGEMENT FIRM

Fund Data Integration

Integrate with fund performance, benchmark and other data sources, including Excel, that feed your fund marketing content. Performance data can be pulled into the platform automatically as soon as it is available, reducing the time before authors can start creating related content. The availability of data can trigger automatic workflows and tasks to create new materials.

Sales Content Management and Analytics

Stop wasting time. Let the right content find you. Predictive AI technology makes it easy for sales and client success teams to find, customize and share fund marketing content with clients and prospects. Now creating compliant, personalized pitchbooks and other collateral is a breeze.

Dynamic Charts and Tables

Dynamically generate thousands of charts and tables automatically as soon as the data is available. Fund professionals can optionally control how data is presented, which benchmarks to use, titles, labels and other aspects that feed into the best possible presentation of fund performance to clients and prospects.



Rules-driven Disclosure Insertions and Updates

Manage and automatically insert legal disclosures using pre-defined, country-specific business rules. The solution can manage a range of different disclosure types including footnotes, endnotes, proximal and dynamic disclosures. If a disclosure changes, update it once and the change can be automatically applied to all references to that disclosure.

Omni-channel Delivery Automation

Preview the content throughout the authoring process to know how content will look in a variety of output formats without having to wait on a production team. Quark's Content Automation Solution for Fund Marketing supports a variety of output formats including professional print, PDF, PowerPoint, responsive HTML, mobile apps and more. Create content once and publish it on-brand everywhere.

Document Cloning for New Production Cycles

Don't create documents from scratch every month or quarter. Automatically clone the previous version of a document enabling the author to start from that baseline. Time period-specific components are duplicated and updated, components that are consistent between periods are referenced and metadata is updated based on business rules for the start of each production cycle. Now that is Smart Content!

Translation Optimization and Automation

Automatically create translation packages in the appropriate format to send for translation and process through translation memory. Translated content is re-imported into the plat-

form to automatically create localized versions of fund marketing documents. Country-specific disclosures are inserted, charts and tables can be reused without the need for additional manipulation and simple workflows makes it easy for local teams to approve documents with minimal effort. This can even happen prior to final data availability, reducing time to market.

Enterprise-class Technology

Quark's fully-integrated content automation technology is engineered for scale, extensibility and security. It can be deployed departmentally or enterprise-wide so as your business grows, so can the content platform that supports it.

Single Repository for Your Marketing Content

Store all of your marketing content in a single repository to make it easy for your team to find, reuse, update and audit all of your content assets. Meta data, role-based access and workflows make it easy to manage content throughout its lifecycle. Works with any file types from text and images to presentations, spreadsheets, video, audio, data and more.

For further solution capabilities, check out the following products on the Quark Web site.

- Quark Publishing Platform
- Quark Author
- Quark XML Author for Microsoft Word
- Quark Docurated
- QuarkXPress
- Quark App Studio

ABOUT QUARK SOFTWARE INC.

Quark Software Inc. develops a content automation platform that helps large organizations streamline the creation, management, publishing and delivery of business-critical content. Our solutions automate the process with reusable Smart Content components that can be dynamically assembled and delivered with precision in any format and to any channel — web, tablet, mobile, print, and more. As a result, leaders in industries such as finance, manufacturing, energy, and government can reduce costs, save time, improve consistency and make their content brilliant.

To find out more about Quark Enterprise Solutions visit www.quark.com

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