



Mellon Global Investments

Leading asset management firm lowers document authoring costs, and improves the variety and quality of product collateral with Adobe® FrameMaker® software and Miramo® software

Mellon Global Investments

- Provides investors with access to Mellon's asset management group, comprising institutional, mutual funds, and private wealth asset management
- Size: The 11th largest asset management firm in the world and the 5th largest in the United States, Mellon has a total of US\$3.1 trillion in assets under management, administration, and custody.
- Headquarters: London, England
- Founded: 1869

www.mellonglobalinvestments.com

Industry

Financial Services

Solutions

- Automated creation of mutual fund and institutional product data sheets
- Electronic document delivery

Products Used

- Adobe FrameMaker Server
- Adobe FrameMaker
- Datazone Miramo software

In Partnership With

- Integrated Publishing Solutions Ltd.
- Location: Warwickshire, UK

www.integrate.co.uk

Company Profile

The organizational structure of Mellon Financial Corporation's (Mellon's) asset management division reflects the belief that while size and scale are important for distribution, in investment management, focus is essential. Building on this belief, Mellon has established a unique asset management model composed of independent investment companies, with each company employing a distinct investment approach. This model allows Mellon Global Investments (MGI), Mellon's global distribution arm, to provide a wide spectrum of investment products from these specialist investment companies.

To automate the creation of fund data sheets and provide affiliated Mellon offices worldwide with faster access to more materials, MGI deployed a network publishing solution built around Adobe FrameMaker and FrameMaker Server software, and Datazone's Miramo software.

Challenges Faced

Respond efficiently to client needs

To meet the varied needs and cultural diversity of its clients, Mellon has established a local presence in cities worldwide. From its international offices and MGI's headquarters in London, multilingual sales, marketing, and client relations teams offer investors dedicated, efficient, and responsive services. As the division responsible for creating and distributing product information, MGI's challenge was to gather time-sensitive information and create a wide selection of product data sheets customized to appeal to Mellon's culturally diverse clients.

Streamline creation of marketing materials

With a broad range of investment objectives, MGI needed to automate the creation of fund data sheets. To produce data sheets, MGI previously relied on a manual process that involved pulling data from an investment system and other sources, and then placing that data into QuarkXPress files. Twelve employees handled this costly, administrative-intensive process. The manual workflow made it difficult to respond efficiently to client needs and limited production of data sheets to English language only. To enhance client services, MGI wanted to create a wider array of data sheets more frequently and in different languages.

Support worldwide sales and marketing efforts

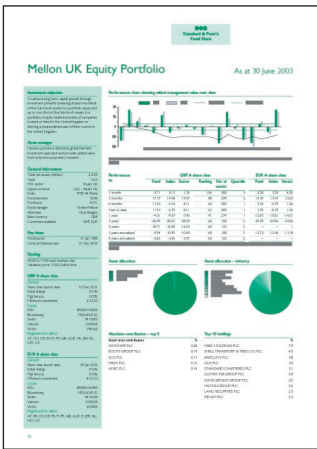
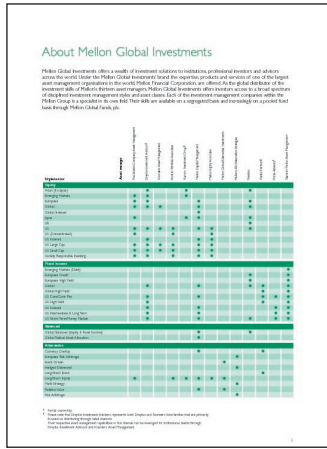
London-based MGI needs to support all of Mellon's offices with product materials that reflect the unique client base of each office. Although a boon to local offices and to customer service, this approach is challenging for MGI because sales and marketing collateral must accurately convey the business philosophies of each regional office. At the same time, MGI needs to ensure both its brand and Mellon's corporate brand are retained across all materials.

Success Strategy

MGI commissioned Integrated Publishing Solutions (IPS), a FrameMaker and Miramo solution provider, to develop and deploy a multilingual document publishing system. Within 12 weeks, IPS had the system up and running, enabling MGI staff to quickly produce more than 70 different fund data sheets tailored to MGI offices worldwide.



MGI has deployed a network publishing solution based on Adobe FrameMaker and FrameMaker Server software, and Miramo software. The system has automated creation of fund data sheets at MGI, by pulling current data and materials from the content sources, converting the information to XML, and sending it to the Miramo application for translation into highly finished documents.



“Our productivity has increased significantly, while our costs have dropped substantially. With Miramo and FrameMaker software, we have more control over document publishing and can produce more timely, relevant materials for Mellon offices worldwide.”

Mark Smith,
Vice president and head of information services,
Mellon Global Investments

Using FrameMaker software, MGI worked with IPS to create document templates that define the general layout and style characteristics of each data sheet. Content for the data sheets comes from many sources—PACE, a performance analysis application developed by Eagle Investment Systems; Hindsight, a Lipper Reuters product; and an auxiliary Oracle database containing logos, corporate descriptions, translation tables, and other elements included on collateral pieces.

When MGI employees want to update data sheets, they access the corporate intranet page for the publishing system and select the type of documents to create. The system automatically pulls current data and materials from the content sources, converts the information to XML, and sends it to the Miramo application, which translates the XML into highly finished documents using the FrameMaker Server formatting and pagination engine. The resulting documents are distilled to a CMYK, color-separated Adobe Portable Document Format (PDF) file for printing. A lower-resolution Adobe PDF file is generated for delivering data sheets online.

“FrameMaker Server and Miramo software deliver the best solution for automating the creation of customized materials, while letting us retain control over document quality and content,” says Steve Shanks, head of knowledge management at MGI. “We can cost-effectively create product documents tailored to the needs of our offices worldwide.”

Business Benefits

- Reduced document authoring costs by \$400,000 annually and realized full return on investment in less than one year
- Increased by ten-fold the variety and depth of data sheets produced
- Enhanced services by offering customers faster access to a wider array of timely product information
- Improved the overall look of data sheets and gained more control over marketing materials

MGI has seen the administrative costs associated with creating product data sheets reduced by more than \$400,000 annually. At the same time, the division can produce a wider array of data sheets that accommodate the language requirements and detail wanted by different clients, such as individual investors or institutional investors. Previously, MGI produced only a handful of fund data sheets quarterly; today, MGI produces more than 70 different pieces of marketing material updated monthly.

“Our productivity has increased significantly, while our costs have dropped substantially,” says Mark Smith, vice president and head of information services at MGI. “With Miramo and FrameMaker software, we have more control over document publishing and can produce more timely, relevant materials for Mellon offices worldwide.”

