

# FINANCIAL SERVICES CASE STUDY

## Mediafly offers global Fortune 500 brand a competitive edge

INDUSTRY: Financial (confidential)

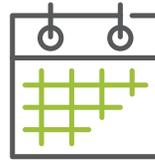


mediafly®  
The Evolved Selling™ Solution

**LOWER**  
Admin Overhead



**UP-TO-DATE**  
Fund Information



During our long evaluation of solutions, it became apparent Mediafly was the only company that gives us the ability to deliver dynamic, interactive selling stories. **-Global Financial Institution Client**

### The Challenge

A global Fortune 500 financial institution needed to improve its sales processes and marketing operations across the company in order to grow revenue. The company's asset management business unit, in particular, relied on frequent, changing market regulations to sell its financial products. This brought up questions regarding how the company could securely and efficiently distribute information.

### The Solution

The company incorporated the use of Mediafly's sales enablement platform into its existing content creation workflow to reduce administrative overhead. Integrations with several existing business systems empowered agents and advisors with a built-in suite for creating attractive, impactful, and value-driven sales presentations.

### The Result

Using the Mediafly platform, the company can deliver personalized insights to customers in every meeting, enabling them to differentiate themselves in a crowded market. Content is updated multiple times each day, ensuring the agents and advisors are always equipped with the most recent and relevant information. Managing and distributing content from the Mediafly platform eliminates the risk of competitors getting their hands on printed collateral left behind. The company has also greatly reduced their printing spend, which aligns with their corporate green initiatives.

### About Mediafly

Mediafly is a mobile sales enablement solution that enhances how brands engage prospective buyers. By using Mediafly's technology, marketing and sales teams at companies including PepsiCo, Disney, GE Healthcare, MillerCoors and Charles Schwab, are able to deliver custom, dynamic sales presentations quickly and efficiently, engaging customers with insights that are relevant to them. Mediafly's Evolved Selling™ solution enables sellers to be more flexible, insightful and interactive in their sales interactions, resulting in increased sales and stronger customer relationships. Mediafly has been named to the Inc. 5000 list of fastest growing companies for four years consecutively in addition to being named Inc.'s Best Places to Work of 2017. Visit [Mediafly.com](http://Mediafly.com) or follow @Mediafly for more information.

Interested in learning more? Visit us at [mediafly.com](http://mediafly.com) or call 1.312.281.5175.

## MEDIAFLY CLIENTS

*charles* SCHWAB

**Goldman  
Sachs**

 **TRANSAMERICA®**