

Activate and safeguard confidential data with advanced content filters

Global investment bank uses Pitchly's data and content automation to save time and ensure every piece is ready for release

AT A GLANCE

The Challenge

Teams were burdened by an unreliable and manual process for flagging data not ready for release

The Solution

Implement conditional layers and filters using the Pitchly Data Enablement Platform

The Results

Consolidated, dependable and automated process for ensuring marketing content is pitch-ready



The Challenge

Before Pitchly, a large, global investment bank had to rely on manual processes to ensure that confidential or flagged data was not exported to public-facing materials. The team struggled to sift through all of their data each time they were creating these marketing materials and needed a solution that could automate this process.

“For each piece of content that we create, we had to manually check and make sure that we weren’t publishing any confidential or unreleased data. It was really inefficient.” - Presentations Manager

The Solution

The Pitchly data enablement platform includes conditional layers functionality, a rules-based feature that alters the appearance of content based on selected criteria. This addresses the struggle that the firm had to ensure that no confidential data was released, and the team isn't required to spend hours manually checking data.

Pitchly uses the data from the centralized database to identify if a deal is flagged as confidential, pending approval, or approved for use according to business-defined guidelines. When the team previews the export material in the Documents App, they can easily visualize and identify any data that should not be included.



Without conditional layers,
missing or confidential data can
slip through the cracks



With conditional layers,
it's easy to see where data is missing
or is not approved for release

Not approved
to publish



Jun 2018

MoneyGram

Nasdaq OMX



Lorem ipsum dolor sit amet,
consectetur adipiscing elit.

Missing Data



Jun 2018

*Confidential client company
name*

Nasdaq OMX



Lorem ipsum dolor sit amet,
consectetur adipiscing elit.

Empty Value

The Implementation

After a quick and simple onboarding process, the team was ready to integrate it into their everyday workflows. The product was so intuitive to their team that they felt empowered to build out the platform independently to suit their needs. While the Pitchly client success team was readily available, minimal support was needed.

Within 6 months, the team was already comfortable within the platform, suggesting product updates and eager to uncover new and innovative use cases to benefit their firm.

While their initial implementation was heavily focused on tombstones, they quickly added bios and a workflow to solicit new deals from stakeholders across the firm using Pitchly's Forms App. They also began exploring creative ways to use Pitchly's Proposal app which exports to Word. They've since rolled out a process that generates a report for deal records that are included in the client's official administrative file.

“When I started using the platform, it was clear that I could be confident in the accuracy of my pre-saved filters. Now I'm empowered to export any content I need at a moment's notice.”

Presentations Specialist

The Results

Pitchly saves the team at least 5 hours each week. This is time that they would have spent collecting and reformatting data. Now, with just a few clicks and a visual check, they could easily ensure that they're not exporting content with confidential or undisclosed information.

Since their content is connected to and sourced from trusted data, the process is much smoother. In addition to time savings, the team has the peace of mind that there's no longer a risk of distributing unapproved data. This creates more reliability and scalability in their marketing processes.

“With Pitchly, there aren’t any accidents with releasing confidential or undisclosed data.”

Presentations Manager

The Pitchly Difference

Your data is one of your most valuable assets, but so is your time.

Pitchly allows you to put all of your data into a single, filterable database to cut down the time it takes for previously manual tasks like tombstone creation. When you can rely on our systems to ensure that your data is quickly and reliably getting where it needs to go, you get that time back to focus on the strategy work that matters.

So start putting your data to work today. [Get Started Now](#)

About Pitchly

The Pitchly platform was built for data enablement. Our mission is to activate data in a way that helps people spend more time on the things that matter to them, and less time on the mundane. And with our platform, we put data to work through automation that saves time, improves performance, and allows your team to focus on what matters most.

Ultimately, we help you win new business faster and easier.

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