

Standardize pitch deck materials and save time through content automation

How Pitchly helped JM Search Executive Search firm optimize their pitch deck processes

AT A GLANCE

The Challenge

Unstandardized data and tedious manual processes

The Solution

Pitchly's data management platform and pre-designed templates

The Results

Saves hours each week and uniform pitchdeck content

The Challenge

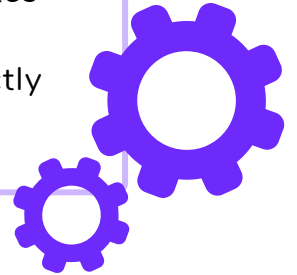
Executive Search firm, JM Search, uses their private equity, portfolio companies, private and publicly held logos to market to their prospective clients. Previously, they had to manually search for company logos and insert placement information into each pitch deck. A single practice area could be tasked to assemble pitch decks as often as ten times per week.

While highlighting previous experience to boost social proof is a best practice they wanted to continue, the manual nature of the work was taking valuable time away from their team members as well as putting the standardization of their content in jeopardy. They needed to automate their processes to increase efficiencies and free up the time of valuable resources to focus on higher-value activities.

"Before using Pitchly, [creating our pitch decks] was a very manual process that didn't allow for any standardization, and it took a lot of time to pull together" says Jessica Reilly, Marketing Manager, Operations and Campaigns at JM Search

The Solution

Pitchly's Data Enablement Platform helped the JM Search team create an online, searchable, centralized repository for all of their closed placements. With Pitchly, the JM Search team would have the ability to quickly filter through the data to identify relevant closed placements. And using templates and tombstone builder, they could populate those placements into pre-designed templates that export directly to PowerPoint.



“We set Pitchly up just like our other internal database. Therefore, when our team uses Pitchly, it is immediately intuitive and easy to use. Team members can get to the placement data quickly.”



Jessica Reilly
Marketing Manager, Operations
and Campaigns

The Implementation

Getting started on the Pitchly platform was seamless for the JM Search team. Full adoption was complete within about a month. The platform was very user-friendly, making it simple to train new users to start adapting it to their daily processes.

The JM Search team needed some assistance from a design standpoint in importing their templates into Pitchly to use, and the Pitchly client success team was able to help, suggest best practices and get them set up for success.

The Results

As a result of implementing Pitchly's Data Enablement platform, JM Search was able to standardize the appearance of their marketing materials. Pitchly's configurable library of templates ensured that the data that they input looked uniform and organized.

Using the Pitchly database filters also saved their team an average of an hour or two per day since they no longer had to manually pull data from their shared drive. It was simple to configure relevant filters and display applicable closed placements in their pitchdecks.

"Pitchly allows us to more easily import our placement examples into our pitch decks and saves us hours from having to do this manually. Pitchly also really helped us to standardize our decks."

Jessica Reilly
Marketing Manager,
Operations and Campaigns

About JM Search

JM Search is a retained executive search firm and trusted advisor to CEOs, investors and board of directors in recruiting, assessing and delivering high performance leaders and transformational leadership teams. JM Search clients include private equity firms, portfolio companies and private and publicly held companies across North America.

Founded in 1980, the JM Search team brings together former operating and financial executives, investors and experience search professionals with deep industry specialization, functional expertise and proven access to talent spanning multiple industry sectors.

With national reach and local market depth, the firm's partner-led approach enables JM Search to deliver exceptional leaders who enhance organizational performance and drive shareholder value.

About Pitchly

Pitchly is a SaaS company based in Des Moines, IA.

The Pitchly platform was built for data enablement. Our mission is to enable 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 automations that save time, improve performance, and allow your workers to focus on what matters most.

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

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