Global Asset Management Firm Deploys Sales Plays to Equip Sellers with Content in Context Using Allego

INDUSTRY: Financial Services | **COMPANY SIZE:** 1,000+ | **LOCATION:** United States

The Challenge

The Regional Sales Director at one of the oldest investment management companies in the U.S. wanted to bring all of his investment management firm's resources to bear on every sales interaction. But there was an obstacle. The company's sales content – from brochures and marketing materials to video examples of best practices – was scattered across different platforms. "In the real world," he said, "time is at a premium. I want my salespeople to be able to go to a Starbucks for 10 minutes before a meeting and have everything that would prepare them for that meeting."

Solution

🗩 Tapping Allego's ability to organize and distribute content through different channels, he created what he calls "the Content Locker" – a centralized, multi-media library of Cliffs Notes-style client intelligence, brochures, competitive analyses, likely client objections and proposed responses, and top-seller sales pitch videos – all instantly accessible to sales reps in the field.

🗩 Recognizing that some reps learn best from watching videos, while others prefer written materials, he made content available in both text and video formats. For example, the firm now catalogs its best sales pitches in the form of PDFs and two- to three-minute videos.

🗩 The Director also integrated his Allego-powered Content Locker with the CRM platform, giving reps the ability to immediately retrieve relevant content and information about clients and prospects from anywhere at any time.

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>
> **Regional Sales Director**
> Investment Management Company

Results

Thanks to Allego, he was able to bring his vision to life. Using the Content Locker, salespeople can now thoroughly prepare for client meetings in 10 minutes or less and present the right materials in context