

# S&P Dow Jones Indices Customizes Sales Content Using Allego

## S&P Dow Jones Indices

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S&P Dow Jones Indices is the largest global resource for essential index-based concepts, data and research, and home to iconic financial market indicators, such as the S&P 500® and the Dow Jones Industrial Average®.

**INDUSTRY:** Financial Services

**COMPANY SIZE:** 400

**LOCATION:** New York, NY

**WEBSITE:** [www.spglobal.com/spdji/en](http://www.spglobal.com/spdji/en)

## Situation: Rapid Shift to Remote Sales

Home to the S&P 500® and Dow Jones Industrial Average®, S&P Dow Jones Indices (S&P DJI) is the world's leading resource for benchmarks and investable indices.

"We develop indices, like the S&P 500, and we license them to ETF provider partners such as BlackRock, State Street, and Vanguard to create products around those particular Indices. My team is called the wealth management channel team," said Brent Kopp, Senior Director, Central Region, S&P Dow Jones Indices. "I educate the sales teams at our ETF partners on how to position our indices in financial advisor portfolios."

But the pandemic changed financial services sales dramatically, as training meetings, product presentations, buyer relationship development, and sales follow-up all shifted to take place remotely. Even as conditions improved and in-person meetings and events returned, virtual components remained.

## Challenge: Adapting to a Digital Sales Environment

For an industry built on relationships, adapting to a new way of selling was challenging for wealth management teams. The old ways of doing business didn't always transfer to hybrid selling. S&P DJI needed to move quickly to adapt to this digital transformation and lead its team into a tech-driven new normal.

"I used to travel 90% of the time prior to COVID. I cover 18 states, so there's a lot of geography. Obviously, that was all shut down over the last couple years, so we had to pivot and figure out how to stay in front of our clients in this environment," added Kopp.

## Solution: Implementing Allego to Connect with Clients

S&P DJI chose Allego as its sales enablement provider. Kopp and his team began using the platform to create and send personalized videos and content to contacts at their ETF partners.

The company publishes a high volume of thought leadership content, white papers, and blog posts, but it's not all relevant to every partner. Allego helped the channel team customize the best content for each partner's sales team, and allowed them to send direct, relevant, personalized information through Allego videos.

"Allego has been a perfect way to stay top of mind with our clients, figuring out how to support them virtually rather than doing it face to face," said Kopp.

S&P DJI then implemented Allego's Digital Sales Room capability to build secure sites with new content dedicated to each partner.

"With a digital sales room, we have a dedicated place where our partner firms can come see all of the content that's relevant to them and their product suite. We are constantly loading it with new information," said Kopp.

Allego's digital sales rooms send an email notification to each participant when new content is added, which brings them back to the room. Kopp has found that they're not only looking at new content but also exploring other content that's already been on the site that they may have forgotten.

"It's a great way to constantly reinforce and have a consistent touch with our clients each time we add new content to a sales room," said Kopp.

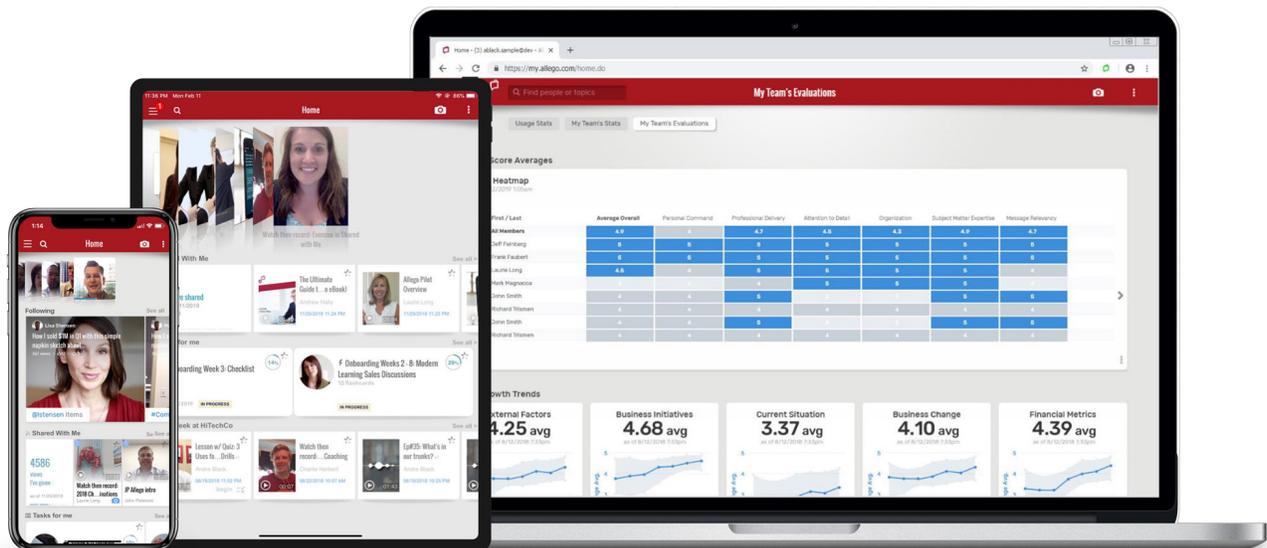
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**BRENT KOPP,**  
*Senior Director, Central Region*

**S&P Dow Jones  
Indices**

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## Results: Personalized Content Builds Stronger Client Relationships

S&P DJI's investment in Allego has reaped numerous benefits for the company, especially when it came to educating clients. The platform enabled S&P DJI to easily share customized content with each channel sales team and maintain strong relationships to encourage sales.

“What we used to do in the past was just kind of a blanket, a one-size fits all. Now, we're able to be more tailored in our messaging and make it really super personalized, super relevant to each of our partners,” said Kopp.

Allego also allowed new initiatives and streamlined processes for Kopp and his team, serving two different purposes efficiently. The platform boosted internal adoption of new content, and was a way for S&P DJI to advertise new content to partners.

“The best subject matter experts have integrated Allego into their content creation process. They'll shoot a video with high-level points from a new paper, and I'll repurpose those videos with our clients to highlight that paper when I push it out through a DSR.”

Allego has helped S&P DJI transform to a digital sales environment, stay top of mind with channel partners, and achieve its sales goals—despite the pandemic.

“We needed to have a different way of doing things in the pandemic. We had to come up with a way to stay in front of our clients. Allego turned out to be the way to do that. We obviously aren't traveling, we aren't meeting people in person, so you either adapt or you fail, so this is how we adapted,” said Kopp.



### About Allego

Allego is the future of sales enablement. Our sales enablement, learning, content management, and conversation intelligence products accelerate performance for sales and other teams. Allego is AI-driven and seller-centric, with the power, agility, insight, and ease you need to drive results in a hybrid world—all in a single app. Nearly 750,000 professionals use Allego to equip sellers with intelligent training, coaching, and content that engages and converts buyers.

Learn more about sales enablement that wins sellers and buyers at [allego.com](https://allego.com).

To learn how Allego can take your sales enablement efforts into a new era of success, [request a demo today](#).

