

# case study

## Financial Services Company

### Background and Problem

This financial services company provides customized retirement and executive benefit plans and investment consulting services. On a quest to find a partner who could provide proven solutions to improve their quarterly statement's customization needs, mail time and cost, the company found their solution with Quantum.

### Quantum Group Solution

With Quantum Group's 100 years of financial printing business behind them, they had the product and services necessary to meet the company's goals - the Statement Dashboard. The Statement Dashboard provides real-time viewing of a client's statement production cycle from start to finish.

### The Story

Our partner had acquired a new retirement plan, adding more volume to their quarter-end process than they could sufficiently handle. Because many of their clients' statements were individually customized, the process was too cumbersome and time-consuming. Their goal was to find a scalable statement platform; one that could provide the essential customization, improved service levels and an additional cost-effective method to format, print and mail their statements.

As an integrated print and marketing automation services provider, one of the unique attributes Quantum offers is their ability to meet their client's demands. Together, the company and Quantum designed and developed the Statement Dashboard to provide real-time, visual observation of the production workflow.

With the level of customization our partner offers, real-time proofing of statements was mandatory and performance monitoring was necessary to effectively manage service levels. To meet these requirements, the dashboard visually displays FTP transmission times and continues with proofing, printing, inserting, metering and finishes with delivery times. Specific instructions can be entered anytime throughout the process to direct detailed processes by client (i.e., Plan Sponsor, Advisor, etc.). Checkpoints are held throughout the cycle for proper reconciliation and if errors exist, they are visually noted and properly addressed. Once complete, automated invoices are produced and electronically delivered. Moreover, the communication between team members is greatly enhanced.

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### Benefits and Outcome

Quantum Group was the ticket our partner required to meet their ambitious goal. Customization needs were upheld, the mailing process increased by 50% and significant unit cost savings were incurred. What the company found in Quantum was a high-speed, high-volume and high-technology partner.

### Client Testimonial

“Our partnership with Quantum allows us to provide exceptional custom print fulfillment services to our clients. The ability to meet our service levels is top-of-mind with us. Quantum provides a unique blend of custom technology solutions with top-level print production and fulfillment services giving them a distinct advantage over others in the industry. Quantum’s statement production workflow engine and statement monitoring dashboard provides us with peace of mind in knowing that we can distribute the customized statements our clients desire, while still meeting their service levels. There is no doubt the Statement Dashboard delivers an enhanced production cycle, along with cost savings. We’re pleased to call Quantum Group a true partner.”  
The Company’s Vice President and Head of the Strategic Solutions Group