

Success story: netwealth

## Three brands, now managed easily as one

### How netwealth successfully uses brandforce to publish complex financial literature

**About netwealth**

netwealth is an unlisted public company established in 1999 and offers a range of investment products to investors. The company is based in Melbourne and manages and advises on over \$4 billion in investment funds.

[www.netwealth.com.au](http://www.netwealth.com.au)

**About brandforce**

brandforce is a web-based automated composition and publishing platform that enables you to produce 'on-brand' communications in minutes

[www.brandforce.com](http://www.brandforce.com)

Located in Melbourne, netwealth provides a wide range of financial services products to investors, and like all financial services companies the need to produce a variety of branded documentation is ever present, ranging from content-heavy publications like Product Disclosure Statements, Financial Services Guides and Retail Product brochures to proposals, contracts, speaker presentation notes and documentation, press releases and even key stationery items.

**The need to produce branded collateral**

In netwealth's case the need to cost effectively produce consistently branded company collateral is even more pressing as the company also owns two other brands in the sector: Financial Planning Services Australia (FPSA) and Bridgeport Financial Services, and indeed some of the same content is now easily repurposed across all three brands.

**netwealth turns to brandforce**

What initially attracted Matt Heine, executive director, and his team at netwealth were the obvious cost savings from automating the production of a range of collateral, and the detailed audit trail that more than met the strict compliance regulations for the demanding range of financial publications produced.

brandforce first conducted a publishing audit and as Matt explains, 'this was a crucial and necessary step to understand how brandforce could really assist to streamline our processes. What we publish on an annual basis was objectively assessed and in working with the team at brandforce, we were able to design and build a library of smart templates that meets the majority of what's required on an ongoing basis, making us pretty well self sufficient.'

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'When we saw brandforce it made a great deal of sense for our financial documentation, explains Matt, "The fact that there is only ever one version and all changes are tracked, logged and saved against this one version makes it much easier to achieve the goal of robust compliance. And the impressive thing, with one click we self publish the document according to our brand guidelines in a number of formats: in minutes we have either a low-res, or a high-res proof to the same standards as if we had sent it to a designer, we can produce our web PDFs and we can have the content repurposed into HTML, all at the click of a button.'

**Three brands, now managed as easily as one**


Gains using brandforce's powerful automated composition engines were immediate and noticeable, and within weeks, the Financial Planning Services Australia and Bridgeport Financial Services brands were setup in the system to capitalise on the much more efficient and cost effective online production methods.

The user environment is controlled by designated client brand administrators who use brandforceAdmin to manage user permissions, access to master documents and the varying output needs.

With a library of centralised master templates, the teams managing the three brands can now quickly create new documents and collateral, repurpose content, share content and self publish a range of financial sales and marketing collateral.

Matt believes the partnership with brandforce is a key factor in achieving cost effective multi-channel brand management, something increasingly important in today's cross-media environment.

<b>USAGE STATS</b>	users 26, templates 86, documents 812, PDFs produced 6,000+
<b>BRANDFORCE APPLICATIONS USED</b>	Publish, Catalog, Admin



**Solution PARTNER**

**Interested in learning more?**  
If so, we would love to discuss how we can help automate your design and publishing workflows to improve performance.

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