



# Selling Investments at Scale with FlightDeck™

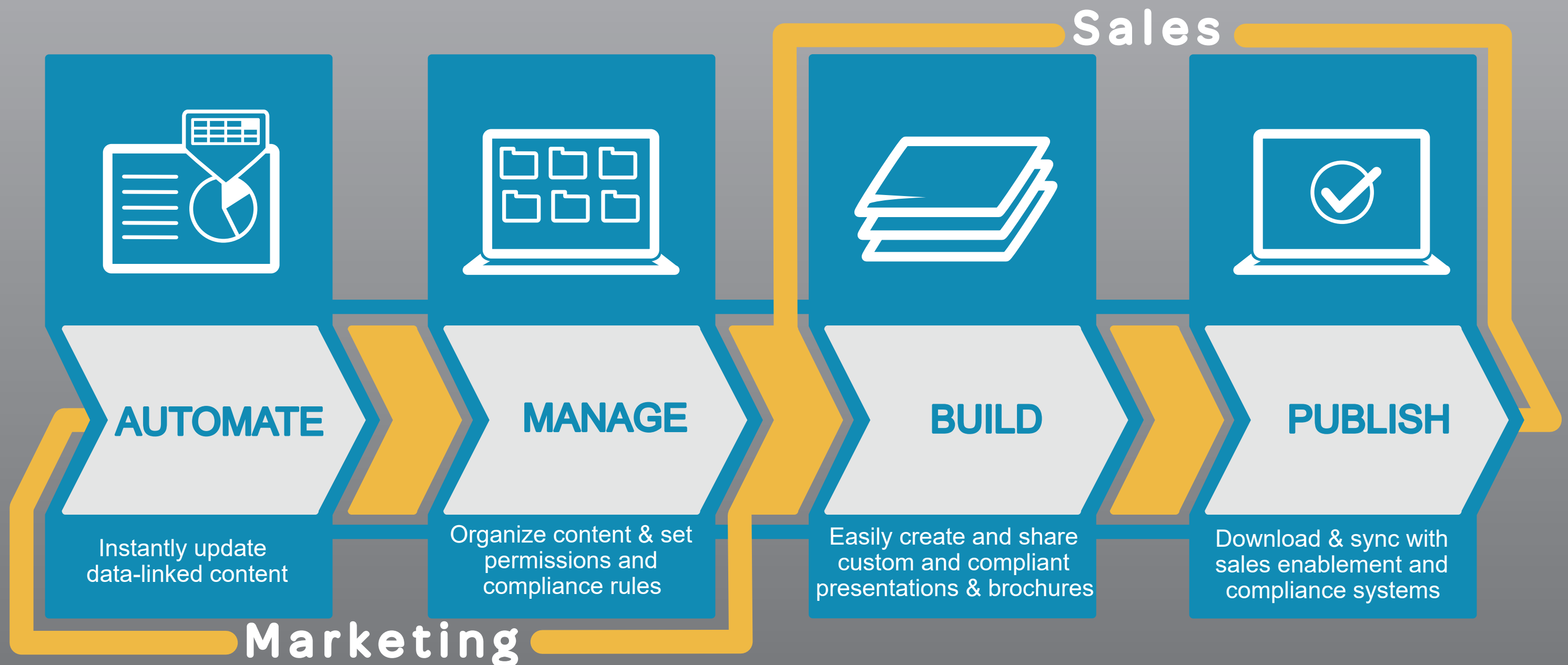
Are you ready to change the game? Give sales reps the ability to create customer-centric and compliant pitchbooks on-demand.

*"Having FlightDeck is quite the sea of change for our group and extremely helpful when trying to win new business with outside partners. The tool delivers a rapid, streamlined, custom client experience."* Portfolio Manager at a Tier-One Global Asset Manager



# Creating CX at Scale

## Scale the Client Experience with FlightDeck™



Asset managers must deliver a superior client experience in order to differentiate from the competition. But what defines a great client experience? It means being first in the door with a great presentation deck that demonstrates an understanding of your client's needs and how your solutions can help. It takes a combination of speed and customer-centricity to stand out. FlightDeck helps asset managers deliver a great customer experience at scale by enabling teams to create customer-centric presentations fast. It brings simplicity and orchestration to the pitchbook management process and allows salespeople to create custom pitch decks with ease. Give your marketing team the ability to automate pitchbook updates, control the brand, and enforce compliance and business rules, while enabling global sales across teams, time-zones, and territories. Created specifically for investment companies, FlightDeck was built to help investment management firms stay compliant while also delivering the excellent client experience that investors and advisors desire and deserve.

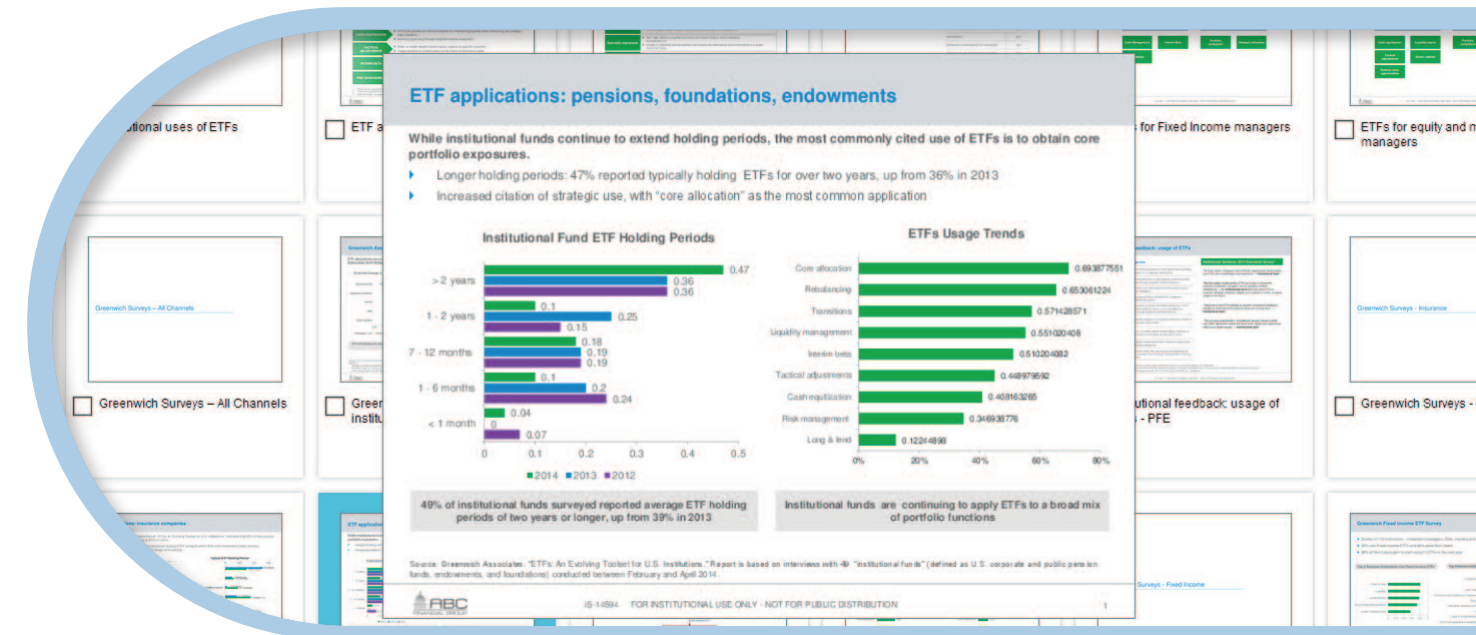
# Marketing Teams

## MANAGE PRESENTATION CONTENT IN ONE PLACE

Manage, update, control, and distribute presentation content to sales teams around the globe.

### Centralized Slide Library

- Upload, store, and access content in a central repository
- Easily update static and data-linked slides in a click
- Update a slide once, it automatically updates wherever it's used
- Organize slides using repositories, topics, and customized meta-data fields
- Apply access controls and permissions on slide content for both content managers and users



Information regarding ABC Financial ETFs

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Slide Name  
Important information regarding ABC Financial

Slide Status  
Staged

#### Content Type

☐ Placeholder ☐ Section Header ☐ Disclosure

#### Content Properties

☐ Is Initially Selected ☐ Is Required ☐ Is Dynamic ☐ Approval Required

Linked Disclosure

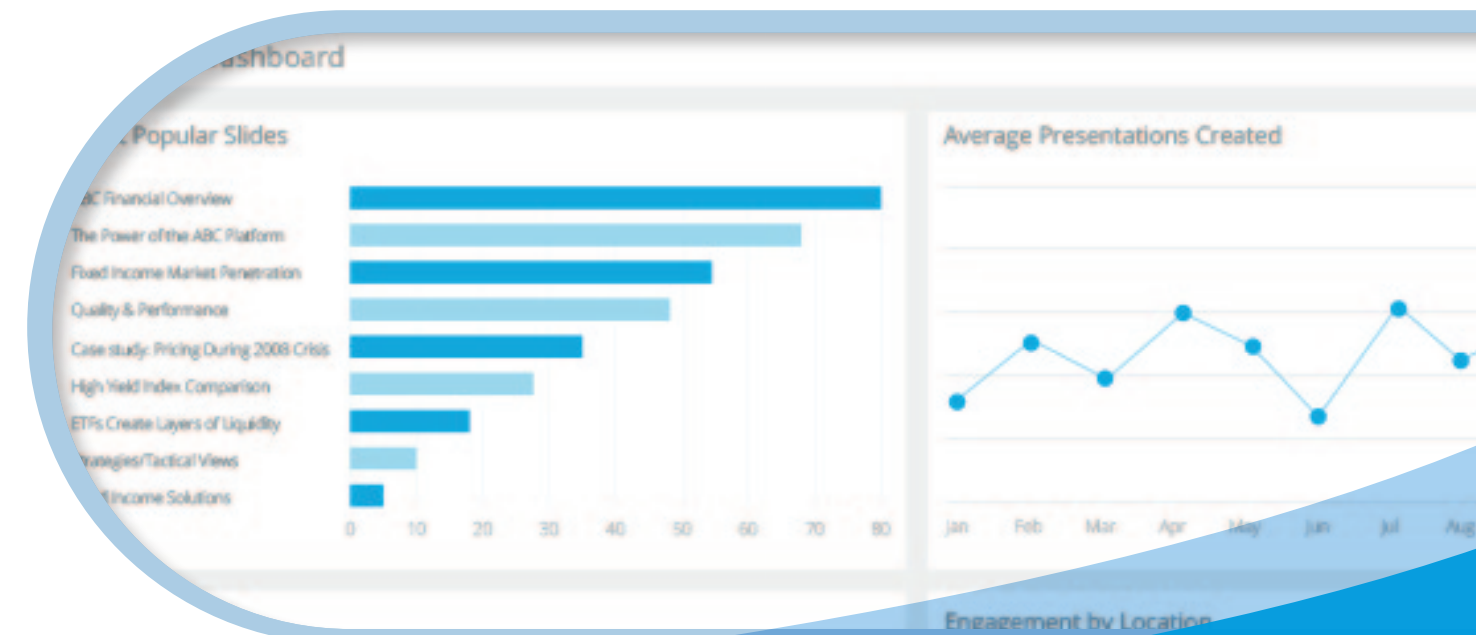
Draft  
Staged  
Live

### Brand & Compliance Controls

- Create unique user experiences for each sales group and channel
- Manage disclosure requirements
- Assign topics, regions, languages, jurisdictions, and sunset dates
- Link and group slides to enforce compliance and business rules
- Granular and flexible content access controls to lock down your content as needed

### Business Insights that Drive Effectiveness

- Get insights on which slides are being used by who and how often
- Understand which content drives sales and which sales reps are most active
- Connect with your CRM, compliance system, and sales enablement solutions to ensure user adoption



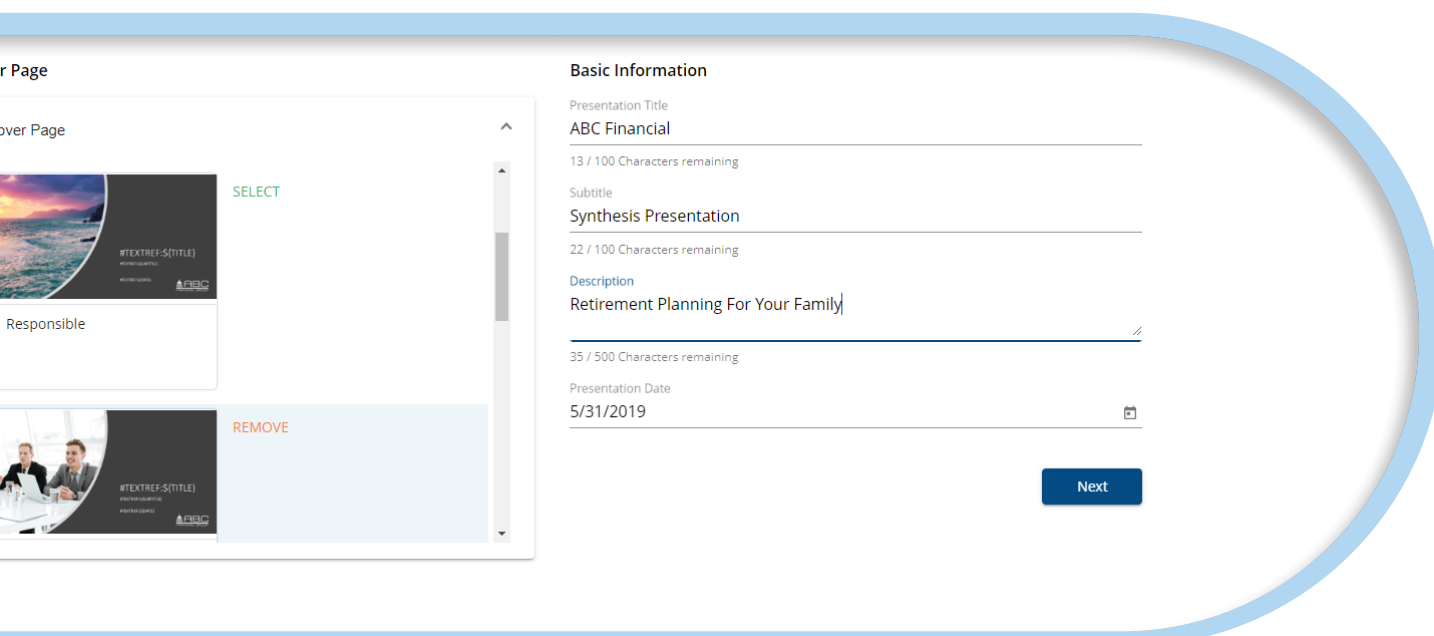
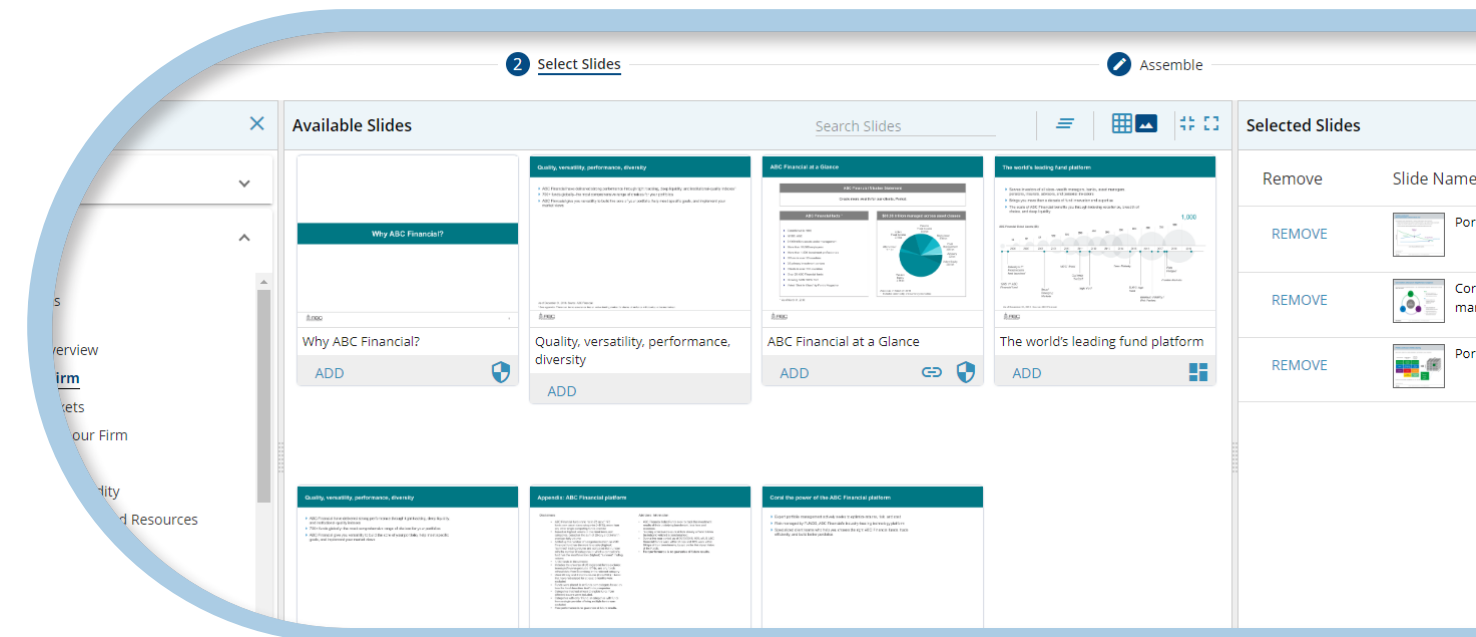
# Sales Teams

BE MORE EFFECTIVE. CLOSE MORE DEALS.

**Quickly generate client-centric presentations that help drive more deals, inflows, and AuM.**

## On-Demand Access to the Latest Content

- Immediate access to slides that are always up to date and compliant
- Easily find relevant slides by searching by keyword or topic
- Download and distribute presentations in Powerpoint or PDF format
- Organize your presentations, save favorites, and customize your favorite decks with ease
- Share presentations with other users and team members

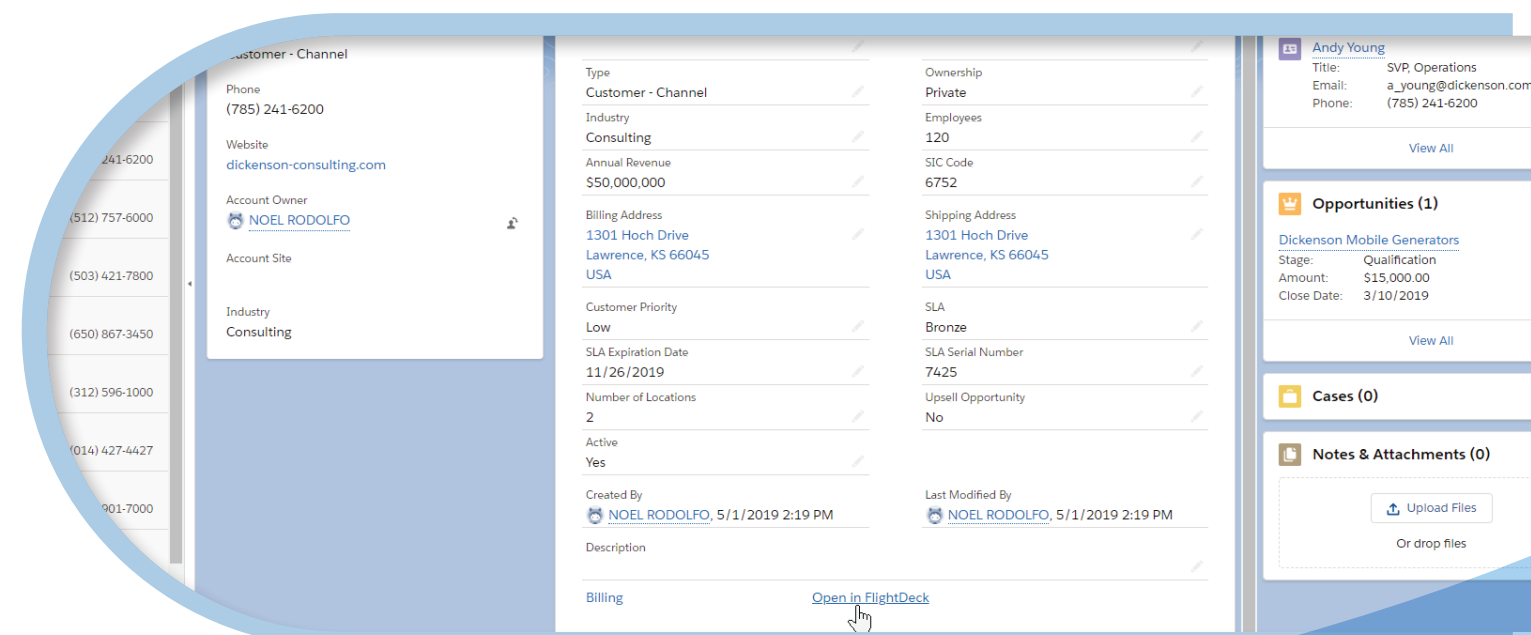


## Personalize Presentations Quickly

- Select from a list of dynamic cover pages based on audience
- Mix and match slides to tailor the story for the specific audience
- Access relevant slides based on region, audience, product, or sales team
- Customize individual slides with pre-approved content and text blocks

## Plug into Your Sales Enablement Tech Stack

- Seamlessly integrate with Salesforce or other CRMs
- Push final presentations to your sales enablement platform
- Connect FlightDeck with your DAM, Compliance, or SSO solution to create a integrated tech ecosystem that reps will love to use



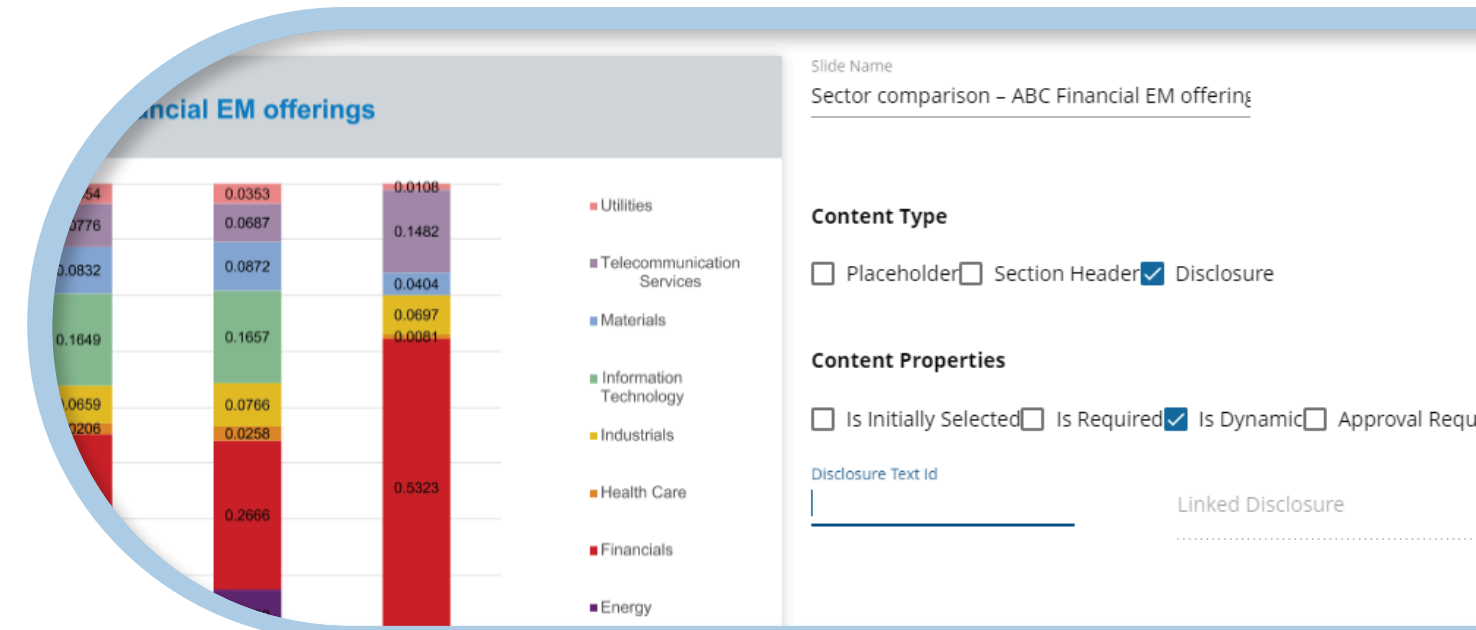


# Compliance & Security

**Regulated companies can't afford to implement systems with security or compliance loopholes. Synthesis has been serving the financial services industry exclusively for over 20 years and have been held to the highest standards by our clients. As a result, we have built our solutions with compliance and security in mind at every level.**

## Data Integrity

- Automatically keep data-driven slides up-to-date
- Include required disclosures and disclaimers
- Get real-time notifications when a change or update is made
- Centrally manage the slide library to keep users on brand and compliant



Edit Important information regarding ABC Financial ETFs

History		
Action	Status	Description
created		Item Created.
updated		Item Updated with the following changes: [status=READY_FOR_RECONCILE] differs from [status=NEW]
updated		Item Updated with the following changes: [status=DRAFT] differs from [status=READY_FOR_RECONCILE]
updated		Item Updated. Exact fields updated cannot be determined.
updated		Item Updated with the following changes: [status=STAGED] differs from [status=DRAFT]
updated		Item Updated with the following changes: [status=LIVE] differs from [status=STAGED]

## Approvals & Audit Trails

- Customize approval workflows to your needs
- Integrate with external compliance and record keeping systems
- Track, store, and record every presentation and provide audit trail reporting

# Industry-Standard Security

- All communication is done through SSL
- Adaptive & Multi-factor authentication
- SAML 2.0 support
- Open ID Connect support
- External IDP Integration
- Persisted data is always encrypted



# Trusted by Investment Companies



*"We chose FlightDeck for a few reasons, but the biggest for me was the elegance and ease of use of the solution. That is critical for us."*

— Director of Marketing for a multinational life insurance company | August 2018

## THE INVESTMENT INDUSTRY'S GLOBAL SELLING SOLUTION

### Professional Implementation

We work closely with your team to ensure your solution is implemented quickly and effectively. No two firms are alike in terms of their client engagement model and internal processes. That's why we built our solution to be flexible and configurable. We welcome the opportunity to learn more about your needs and help you satisfy them with Synthesis FlightDeck, The Investment Industry's #1 Global Sales Solution .

### READY TO GET STARTED?

[Get in Touch Today](#)



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