

Case Study

St. James's Place Wealth Management

St. James's Place is a wealth management business, providing highly-personalised, face-to-face wealth management services to individuals, trustees and businesses.

Advice and support is delivered exclusively by their network of adviser – or 'Partners' – collectively referred to as the St. James's Place Partnership. They build long-term client relationships and comprise some of the most experienced and able professionals working in wealth management today.

In order to create a bespoke service for each of their clients, the Partners have access to a wide range of St. James's Place-branded marketing materials, business stationery and client gifts, all of which they are able to customise for their specific practice and client requirements.

The challenge

In 2007, and with around 1500 partners, St. James's Place had plans for rapid growth which put an increased demand on the requirements for personalised marketing material and business stationery.

Up until this point, ordering these items was a complicated, manual process for the Partners, managed by several separate location centres. Orders – including artwork amendments – were faxed through to the incumbent print

management company, who created artwork and placed the orders. The items were then delivered back to the location centre, which in turn, delivered them to the Partner. It was a laborious and inefficient process.

At this time of growth, St. James's Place started to look for an alternative, cost effective solution, underpinned by technology which could be easily scalable without incremental costs.



“Enable is the perfect solution for our complex marketing collateral needs. It removes the administrative burden and has drastically reduced the amount of time we have to spend on getting materials to our Partners. They now have instant access to both the corporate and personalised collateral they need.

The Perivan team work hard to understand our business, providing cost-effective and dedicated marketing operations support, along with the expertise to ensure that both we - and our Partners – are filled with confidence.”

Chris Goodfield

Head of Design and Production Services, St. James's Place Wealth Management

The solution

Perivan was proud to be appointed by St. James's Place in 2008 to provide a robust, streamlined and centralised marketing services solution for production, storage, print and delivery for all their marketing requirements.

Enable is Perivan's proven marketing services technology solution. It enables clients to concentrate on their core business, while all aspects of the production and delivery of their marketing materials are taken care of.

Proven and trusted results

Enable is able to provide the Partners at St. James's Place with 'just in time' – usually next day – delivery of collateral which can be called down from an online or hard copy library of available marketing materials. All orders are logged and managed, ensuring St. James's Place has an oversight of every item ordered.

The Perivan team takes full responsibility for all proofing and version control so all files are provided print-ready and compliant with the St. James's Place brand standards. Perivan also provides access to expert advice and helpdesk support for the St. James's Place marketing team, 4,500+ Partners and employees.

Not only has the process been streamlined, the marketing services solution also capably handles the increasingly high level of personalisation required by St. James's Place and their large Partner Community.

Over the past 11 years Perivan has developed and evolved the Enable platform for St. James's Place and continues to provide them with an ultimately scalable and optimised solution. They now provide over 50 templated items, from business stationery to PowerPoint presentations, mailers, brochures and event material. The range of stocked items has broadened from marketing collateral to event and gift items, all centrally managed from one single marketing hub.

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