

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 community of adviser – or 'Partners' - collectively referred to as the St. James's Place Partnership.

The challenge

St. James's Place is a long-standing client of Perivan; they were the first user of Perivan's *Marketing Store* and by 2018 had been using the platform for twelve years.

By then, though, the business felt that its requirements, and those of its Partners, were outgrowing the existing platform's capabilities. Increasingly, the business wanted to increase the number of self-serve products and services available to their Partners and employees, including dynamic templates to ensure consistency and enable the creation of compelling materials at the click of a button.

Being mindful of the environment impact of print – and recognising that some clients now wish to consume information in different ways – the business wanted to provide greater flexibility in terms of offering access to both printed and electronic materials.

As a result, St. James's Place approached Perivan with a wish list of upgrades. Their aim was to create a 24/7 marketing collateral hub that could support the entire business.

The solution

The Perivan and St. James's Place teams worked closely together to identify what was needed from the platform. During this process, they realised that a number of offerings already existed, but the system was not intuitive enough and its full capability was not being utilised. Part of the solution, therefore, alongside adding to and redeveloping the site, was to make it more intuitive, so that Partners were aware of, and could easily access, all the products and solutions it offered.



This was an ambitious and wide-ranging project, but Perivan held our hands all the way. The site upgrade involved wholesale redesign, but also incremental changes that delivered huge benefits. Whatever the change, the Perivan team nailed it every time. We're delighted with the way our two teams worked together, and the progress that has resulted.

Chris Goodfield

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

Having established objectives and priorities for the project, the teams set about the redesign and worked closely over the course of what became a two-year build. An extensive internal requirements list grew into an initial concept, with face-to-face meetings used to map out the structure of the site and scope of the project.

From there, the two teams worked collaboratively to develop the site and the complex templating requirements that would support both personalised, dynamic collateral as well as standard corporate literature.

Because St. James's Place has a unique structure, it has unique demands. Its allowance model, which differs in value and nature depending on the user group, introduces an extra layer of complexity to ensure the accurate management of the monthly, quarterly and annual allowance structures. In addition, these set allowances help control and facilitate the ordering and fulfilment of all marketing collateral.

St. James's Place needed a structure that would both enable users to order materials in accordance with their allowance, and also keep track of spend, showing the percentage of allowance used and any costs incurred for exceeding it. All of these requirements increased the complexity of the build.

The results

The new site has a totally upgraded look and feel.

Its enhanced functionality makes it easier for users to access corporate literature and create professional, dynamic, personalised collateral that ensures brand consistency. Users are also able to choose their preferred output for materials – printed, flipbook or pdf – at a single click.

Partners can create professional client communications quickly and easily, building their own personalised literature via dynamic templates that allow them to produce customised content and design, tailoring communications to every client demographic.

The site now makes it clear, simple and easy for Partners and employees to buy branded merchandise and client gifts, some of which raise money for the St. James's Place Charitable Foundation.

Greater transparency makes the process of creating and ordering marketing materials easier, quicker and more efficient. A new internal single sign-on makes log-in much easier – Partners can also nominate trusted users to order on their behalf, making delegation easier while also creating better MI and a clear audit trail.

The site is now much easier to use and has become the central source for ordering all marketing collateral across the business, allowing St. James's Place to begin the process of moving away from hosting collateral on their intranet. In the future, all their marketing collateral will be hosted solely on the site for all Partners and employees.

The foundations for a whole new way of working

Now that the first stage of the rebuild is complete, the business is able to use that as the foundation for further enhancements; new developments in the pipeline include the potential for e-business cards, e-greeting cards and an online mailing facility.

For more information or to request a no-obligation demo of our platform Enable please contact us via:

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