



How Shufflrr Helped U.S. Bank Streamline Presentation Management



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Table of Contents

U.S. Bank- Company Profile.....	3
The Problem.....	4
The Proof.....	5
Opportunities.....	6
The Search.....	11
The Solution.....	12
Conclusion.....	14
About Shufflrr.....	15
Spotlight: Core Requirement.....	16



U.S. Bank – Company Profile

U.S. Bank is one of the largest banking institutions in the United States, holding nearly half a trillion dollars in assets. Tracing its history back to 1863, U.S. Bank offers banking services to individuals, businesses, government agencies and other financial services firms. The bank, which is headquartered in Minneapolis, employs 74,000 workers and has offices spread out across the United States, Canada, and Europe.



The Problem

“We were reinventing the wheel every time...
then we found Shufflrr.” – Scott, U.S. Bank

U.S. Bank faced an all-too-familiar challenge:

Without a central presentation management strategy in place, employees had to search through dozens of different repositories to find the slides and other files they needed to do their jobs.

In some cases, these time-consuming searches ultimately succeeded, with workers tracking down the presentations they were looking for.

But that didn't always happen, which forced employees to do one of two things:

- **Create their own slides** and draw the ire of the marketing and legal teams.
- **Use an older deck** and risk pitching from outdated messaging, outdated regulatory information, violating brand guidelines, and more.



The Proof

When Microsoft chose to no longer support SharePoint Slide Library, U.S. Bank knew it was time to look for a new solution.

Through a combination of surveys and follow-up focus groups, the marketing team identified the challenges employees faced in assembling presentations. Disjointed organization meant employees needed to go to 6-10 different places to find slides and what they ultimately wanted, and needed, was a centralized location for presentation materials. Marketing managers spearheading the efforts realized they needed an enterprise solution that would enable the company to centralize presentation management, ensuring employees could easily locate, access and update the most current presentations—regardless of whether they were on the road or which office they were working out of.

Without a true presentation management solution, the risks of out-of-date slides being presented to clients or prospects would continue to remain.

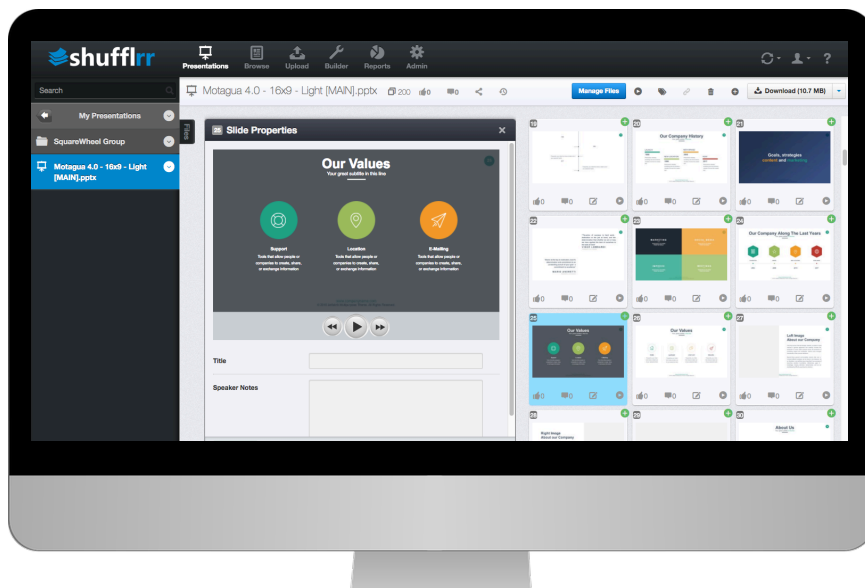


Opportunities

After collecting employee feedback, the team at U.S. Bank put together a list of 17 core requirements of what they believed their next presentation management system needed (See, *Spotlight on Core Requirements* Page 16). These requirements fell into 3 key areas:

- **Instant slide updating** that could push updates to dozens or even hundreds slides in seconds. Employees would no longer have to duplicate work and would always be able to access to most current assets.
- **An easy to use, centralized repository** where employees could quickly find, reuse and repurpose slides and presentations.
- **The ability to track users and analytics** so they could easily determine which assets were most powerful and successful.

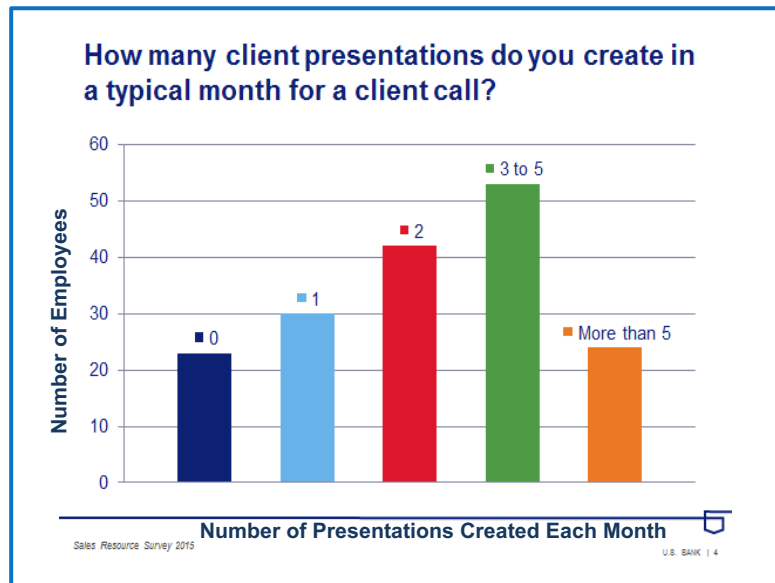
After studying the feedback, U.S. Bank identified a number of opportunities they could capitalize on by moving to a new presentation management solution.



Opportunities

1. Reduce the amount of time employees spent creating new slides.

According to their research, most U.S. Bank employees created at least three presentations every month. Without a central presentation management solution in place, much of that work was duplicative.



By moving to the right solution—one that enabled all employees, regardless of where they were, to easily access the company's best slides—U.S. Bank employees could reclaim a ton of time, which could then be invested in other important sales endeavors.

It used to take five hours for the average employee to create a presentation. Using the original U.S. Bank numbers the savings were astounding:



Opportunities

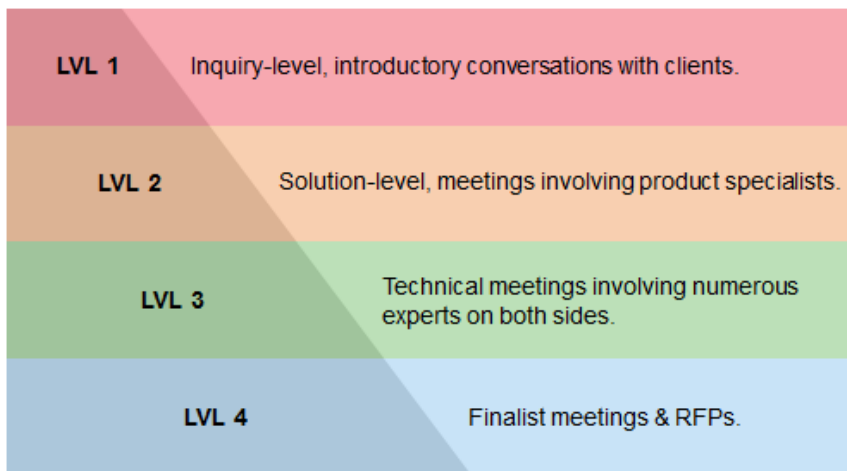
2. Create better content and accelerate approval processes for new presentation decks.

When everyone's working on their own content, some presentations will wind up stronger than others. Everyone has different skill sets, after all. Some people are good at making presentations, others are better at talking to prospects in person.

With a centralized presentation management solution in place, U.S. Bank would be able to create stronger content across all levels because they would be able to leverage their best content producers, freeing other employees to focus on the tasks they do best.

Not only would presentations become more persuasive, new content could also be approved faster because the content team could access files from any connected device.

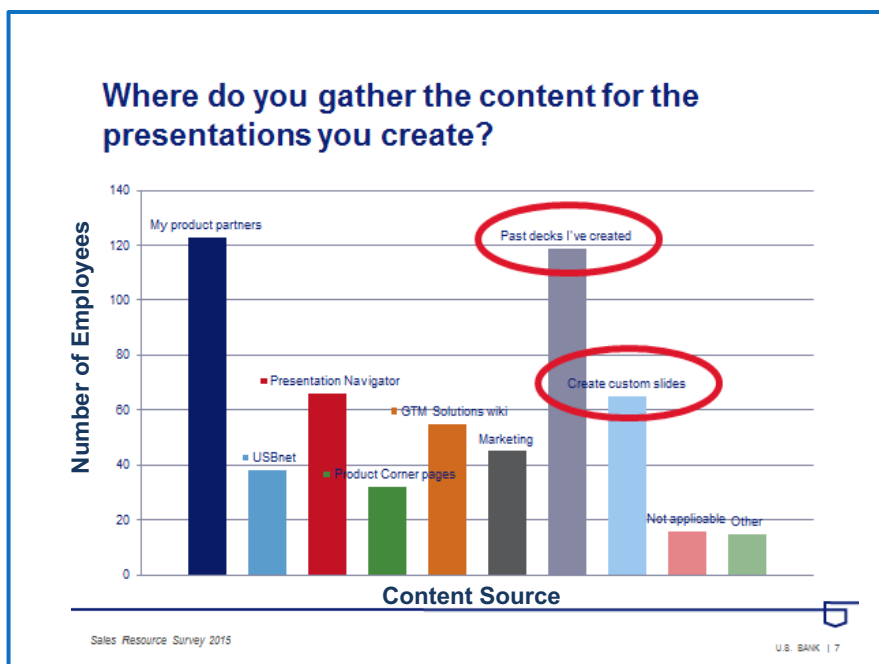
Develop robust content – across all levels



U.S. BANK | 5

Opportunities

3. Guarantee up-to-date, compliant, and accurate messaging was conveyed in each and every presentation.



Employee feedback indicated that a significant number of workers were using the old decks they created to build new presentations. That approach, unfortunately, eventually results in salespeople pitching from outdated or inaccurate information.

The right presentation management solution would ensure that every presentation featured the company's most current messaging—and that employees rarely if ever presented outdated information to potential clients.

Opportunities

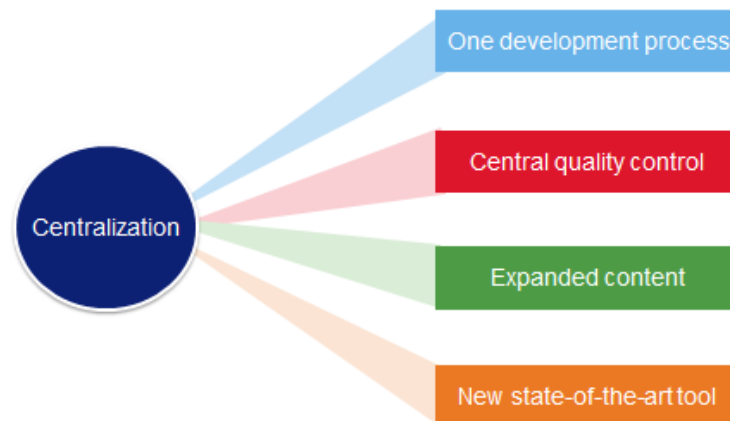
4. Store all assets in a central location—eliminating several repositories.

As the current system existed, employees were storing presentations in many different locations. “They had to go to a dozen different places to get their presentation materials,” explains Danielle, Sales & Marketing Resource Manager at U.S. Bank. Not only did that make it harder for people to find the decks they needed, it also presented a number of risks.

Maybe people pitched off the wrong decks because they couldn’t find the ones they were looking for. Or maybe someone couldn’t find the right deck and decided to improvise altogether.

With the right solution in place, U.S. Bank could ensure that everyone knew where to find the assets they needed—and quickly.

Centralize PPT content = MITIGATE RISK



U.S. BANK | 4

The Search

“What used to take 5 hours now takes 5 minutes.”
– Scott, U.S. Bank

U.S. Bank ultimately concluded that they had two options:

1. **Go back to the status quo.** Users would have to open up multiple decks and copy and paste slides from one presentation to the next when they needed to create collateral. From a branding perspective, that’s a nightmare. It’s impossible to maintain consistent layout and design. Regulatory and legal compliance would be virtually impossible. And product information would rarely be accurate.
2. **Find a new system.** By finding a solution that met the bank’s 17 requirements, and doing the due diligence necessary to determine which vendor made the most sense for their specific situation, U.S. Bank could streamline its presentation management strategy—making their employees’ lives easier while increasing conversion rates. The new solution would need to provide usage and analytics information, enable employees to collaborate with ease, give admins the ability to give different users different permissions and make it easy to track down slides, among other things.

U.S. Bank decided to search for a new solution. After weighing their options, they ultimately zeroed in on Shufflrr, the world leader in presentation management. Shufflrr’s solution enables companies to leverage their strongest assets in every pitch.

The Solution

“We find that people talk across the company—so many groups have the exact same pain points, and Shufflrr addressed all of them.”

– Danielle, U.S. Bank

After a short pilot program, U.S. Bank officially rolled out Shufflrr in May 2017. The goal was to get 1,000 users in order to get a price reduction on the cost of licenses—a move any smart, well-financed company would make. U.S. Bank started with 1,000 users. But without even trying to grow the program, they’ve had 500 additional requests across the company for Shufflrr licenses in less than a year.

“People hear about it, and they’re like, I really need this,” says Danielle, who helps employees with Shufflrr onboarding at U.S. Bank. “We find that people talk across the company—so many groups have the exact same pain points, and Shufflrr’s addressed all of them.”

When they were using SharePoint, the team at U.S. Bank managed 51 decks.

“Whenever we had to update, it was a nightmare,” explains Scott, who manages content at U.S. Bank.

Once Shufflrr was deployed, 51 decks became 90 decks within the first six months. Less than a year later, they’re now managing 199 decks. U.S. Bank is managing all of these new presentations and slides with the same staff while using much less employee time. This made possible by Slide Updating. Marketing team members can quickly disseminate changes nationwide and Shufflrr’s social features allow for quick edits and iterations company-wide.

“For years, we’d been culling together slides for our information security content,” Scott continues. “We were reinventing the wheel every time. We knew there had to be a way to standardize our content so that all bankers on our system would always have the best assets. Then we found Shufflrr.”

Results

After the U.S. Bank team saw Shufflrr, employees were sold. Everyone loved the fact that they wouldn't have to rebuild decks and that revisions were automatically updated and rolled out to the entire organization. Now, thanks to Shufflrr, no one really has to create new slides or edit existing ones because the most current versions are easily accessible. Not only does this convenience save a lot of time, it helps U.S. Bank ensure consistent messaging.

All of a sudden, a task that used to take five hours—preparing a deck for a presentation—now take five minutes. Add it up, and it's an extra 4 hours and 55 minutes that can be spent on sales calls, per employee. Multiply that number across a team of 150, and you've reclaimed 737.5 hours.



The decision to switch to Shufflrr has translated into several benefits:

- **Consistent messaging.** Once Shufflrr was deployed, one central content team was able to control content production, ensuring that each department's assets were on message. The content team now has the final say before presentations become readily available to the rest of the organization, making it easier for a national company to achieve consistent messaging.
- **Comprehensive content.** With a strong presentation management in place, the content team was able to roll out centralized best practices to every department—shattering silos along the way. Instead of pursuing the same goal separately, all departments can now work together with ease. Ultimately, this led to many additional business units creating presentations—which enabled the bank to deliver even more value to its customers and partners.
- **Customized assets.** Thanks to Shufflrr, marketing teams can create assets that are customizable for each client. One central presentation might have 75% of the data the client is looking for—but it might fall a bit short somewhere else. With Shufflrr's drag and drop functionality employees can select from a large library of preapproved slides and quickly add client-specific content where needed.
- **Employee engagement.** With a centralized presentation management solution, employees no longer have to jump from drive to drive looking for content. Everything's much easier to manage—which makes everyone's job more enjoyable, increasing productivity. U.S. Bank has noticed an uptick in engagement on their slides. Who doesn't like using modern platforms?

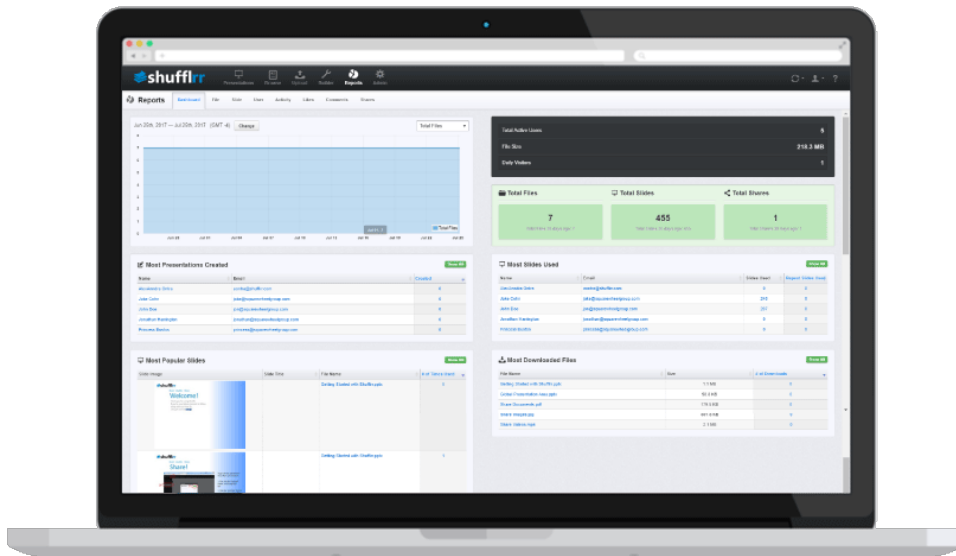
Conclusion

U.S. Bank chose to rely on Shufflrr which proved to be a wise decision. Not only is the company's messaging more consistent and effective, they're able to deliver more value to their customers and partners—while also making life easier for the 1,500 employees that develop client presentations every week.



About Shufflrr

The World Leader in Presentation Management



Organizational performance is built on speed, accuracy and control. Shufflrr helps you bring these concepts into your most vital content: presentations. From sales teams to speaker bureaus to marketing campaigns, you can finally manage and measure all your presentations in one place.

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Spotlight: Core Requirements

Thoroughly defining your requirements is a critical step in any successful software assessment and implementation—whether you're a small business or a large enterprise like U.S. Bank.

When U.S. Bank began its search for a new presentation management system, they surveyed their staff to see what pain points they were experiencing. Leveraging that data, they developed a list of 17 core requirements they'd use to measure all potential solutions, including Shufflrr.

The right solution would offer the ability to:

1. Track usage and report analytics
2. Set unique permissions for different users
3. Define unique metadata properties to manage content and characterize users
4. Integrate with Salesforce
5. Comment on content and manage comments
6. Lock files to prevent editing by general users
7. Email files directly from the system
8. Maintain a version history, access limited by user profile
9. Force slides to always be kept together
10. Allow slides to be selected individually
11. Force removal of slides from individually created decks that are removed from the library
12. Force automatic updates to slides in individually created decks that are updated within the library
13. Sort, filter and search through slides in a variety of ways
14. Convert presentations to PDF format
15. Access and use functionality via mobile devices
16. Create auto-built presentations based on a series of questions and user input
17. Collaborate on presentations within the platform

After doing its due diligence and testing several solutions, U.S. Bank ultimately concluded that Shufflrr was the only platform on the market that could meet all of its requirements—and then some. Their decision was easy.

Since making the move to Shufflrr, U.S. Bank hasn't looked back.