

CASE STUDY

How Diamond Hill Established Quarter-End Efficiencies with Synthesis Publisher

Diamond Hill is committed to excellence. They are widely known for capitalizing on their intellectual curiosity to deliver industry-best results. When their Marketing team was increasingly challenged by timeliness, accuracy, and resource allocation roadblocks during the quarter-end period, they knew it was time to invest in a new solution.

Their dedication to building enduring partnerships with other brand-leaders led them to Synthesis Technology.

The Quarter-End Crunch

Like most asset managers, Diamond Hill managed their data and distribution processes in-house. However, as the firm steadily grew its product offerings, their data management and quarter-end production process also grew in complexity.

“Their experience working with asset managers like us has *saved immeasurable time, money, and frustration*. I don’t know how you can afford not to partner with Synthesis.”

~ Director of Marketing, Diamond Hill

Challenge

A complex quarter-end process that required manual review and data verification.

Solution

Synthesis Publisher to automate the quarter-end fund fact sheets, website, and sales collateral.

Result

Content automation and publishing drove:

- 30% reduction in manual verification
- Company-wide confidence in quarter-end data validation
- Hands-off quarterly data management
- Time to focus on value-add marketing initiatives

It became increasingly clear that automating the process was the only long-term solution. After exploring several options with different vendors, true automation remained elusive. Proposed software and process changes failed to meet expectations. The Diamond Hill Marketing team was forced to invest significant time into manually verifying data and content when the process should have been fully automated across fact sheets and pitchbooks.

These outdated methods placed a lingering burden on the Compliance, Sales, and Marketing teams during the critical quarterly reporting period. They needed a single solution that addressed all of their concerns.

Identifying the Need

The condensed nature of the quarter-end cycle left little margin for error. The Diamond Hill team knew they needed a solution that would:

1. Update, verify, and prepare sales and marketing materials for distribution with speed, efficiency, and 100% accuracy.
2. Improve quarterly data verification.
3. Create new data-related workflow procedures that would account for the scarcity of internal resources without sacrificing quality of the end product.

The Synthesis Solution

Synthesis Technology is an end-to-end content automation and publishing platform that empowers investment companies to improve their marketing efficiencies and grow AUM.

“Synthesis arrived with solutions that were industry-tested and ready to go.”

After exploring options with other industry vendors, Diamond Hill entrusted Synthesis to automate their quarter-end fund and composite fact sheets. In just four months under the expert direction of the Synthesis team, Diamond Hill achieved connectivity between its systems and other data sources to ensure the flawless movement of data across those structures.



Diamond Hill achieved full automation, starting with the firm's website and fact sheets then extending the process to pitch books and sales aids. At each stage of the automation process, trial runs were conducted to ensure data were consistently and accurately delivered to the firm's collateral and website.

The end result was the system-wide implementation of Synthesis Publisher, a fully automated SaaS solution for data-driven marketing, sales, and regulatory documents.



“The reduced stress and removal of the late nights during quarter-end also helps with retention and *creates a better work life balance.*”

The Result

The effects on the firm's Marketing team were dramatic. The individuals needed to review quarter-end data, materials, and website pages were **reduced by nearly 30%**. The reliability and quality of Synthesis Publisher enabled the Diamond Hill team to gain confidence in their own work. And, with the time freed up by automation, the Marketing team prioritized their own strategic initiatives, strengthening their position within the firm.

Since introducing these new quarter-end efficiencies, the Diamond Hill Marketing team has added resources to augment their core functions, with new hires in digital, content, and analytics.

About Diamond Hill

Diamond Hill is a mid-sized investment manager with a focus on both retail and institutional markets. The firm offers more than a dozen products with approximately \$27.5B in AUM (as of 1/31/24).

About Synthesis Technology

Synthesis Technology provides an end-to-end content automation and publishing platform that empowers investment companies to improve their marketing efficiencies and grow AUM. Since 1998, Synthesis Technology has leveraged its industry expertise to enable global asset managers to automate, scale, and improve the efficiency of their data-driven content across their enablement and regulatory documents. Our flagship solution, Synthesis Publisher, is proven to improve content automation and publishing processes by **50%**.

To learn more about how Synthesis Technology can transform your business, visit www.SynthesisTechnology.com

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