

CASE STUDY

Creating pitch books 83% faster



COMPANY PROFILE

HQ: McLean, VA | 47,300 employees

Revenue: \$25.5B

Overview: Capital One is a bank holding company specializing in credit cards, home loans, auto loans, banking, and savings products

83% faster creation of pitch books

10 repositories replaced by Seismic

Challenge

Capital One wanted to improve their digital initiatives to help over 400 bankers in their small business banking division create better client experiences. These bankers kick off new engagements with potential customers in a deep dive meeting to learn about their financial goals and needs. From that meeting, bankers and their sales support staff would manually create pitch decks with a selection of over 60 different products and solutions. Each pitch deck took nearly two days to complete, with information from 10 different repositories. While bankers and support staff moved from printing pitch decks to sending them via email, Capital One still knew they could improve their processes to get information to their potential customers faster before heading into final negotiations.

Solution

Capital One decommissioned all 10 disparate content repositories by adopting Seismic. Bankers and support staff can personalize the initial deep dive meeting deck in a matter of seconds. Pitch decks are being created faster too. It only takes 20 minutes to choose the right products and solutions. Additionally, they can customize the decks with information about the proposed support team - including the names and titles of their branch managers, support specialists, and merchant services support. Instead of printing or sending through email, Bankers now use Seismic directly on their iPads to walk customers through their pitch book, which has improved customer experience.

Results

Each pitch book only takes 20 minutes to build, down from two days by collapsing 10 repositories and streamlining the process. Bankers can use that time to see more customers and build deeper relationships.