



Compiling custom presentations with a pick-and pack strategy

Headquartered in Kansas City, MO with 6,000+ employees, Lockton is the world's largest privately owned, independent insurance brokerage firm.

The Challenge

Lockton maintains an extensive resource library to build PowerPoint decks. This includes 80 core slides and 800 tactical slides that are used to build strategic presentations for prospects. Creating the content for these slide decks was manual and time consuming. Lockton's sales team would often reach out with requests for custom, personalized slides that overwhelmed the marketing team. Keeping up with these requests while ensuring the materials were compliant and on-brand became unmanageable.

The Solution

Lockton rolled out a pick-and-pack slide strategy powered by Seismic's LiveDocs® technology. Sales reps can quickly compile custom presentations using a Seismic LiveDocs® form to leverage information from account profile fields. The marketing team now has full version control to ensure content is on-brand and compliant.

The Impact

Today, every sales rep can easily access the core slide deck, add specific topical slides from a larger library of tactical content, and reorder the slides as needed to generate a high-quality final presentation. Additionally, marketing maintains control of content to guarantee consistent messaging and branding across the organization.