



Building Investment Banking Pitchbooks Faster Using the Microsoft Office System

The processes for creating and compiling investment banking pitchbooks are often time-consuming and labor-intensive, relying on manual systems for collection, approval, and production. These outdated systems and methods can lead to missed deadlines, inconsistent branding and messaging, lack of corporate compliance, and lost opportunities. An investment banking pitchbook solution can help companies decrease their pitchbook preparation time, improve pitchbook quality, and facilitate more effective collaboration across teams.



The Investment Banking Pitchbook Challenge

Pitchbooks are essential tools for an investment bank's ongoing business development and are critical for attracting new opportunities and responding to client requests. The current processes for creating pitchbooks can present challenges:

- **Analyst Challenges**
Creating and assembling a pitchbook relies on time-consuming, manual processes. The information that goes into the pitchbook can be out-of-date and disorganized. Also, it can be difficult to collaborate and share information with other members of the pitchbook team.
- **Managing Director Challenges**
Enforcing corporate branding and ensuring regulatory compliance is difficult. It can be difficult to track the progress of new deals.
- **Pitchbook Team Challenges**
Teams can experience e-mail overload, inefficient review cycles, lack of insight into pitchbook creation schedules, and poor visibility on task management and issue resolution.

Benefits of an Investment Banking Pitchbooks Solution

With an investment Banking pitchbook solution based on the Microsoft® Office System, an investment banking company can:

- Save time and money by automating processes to reduce pitchbook development cycle time.

- Improve corporate learning by promoting best practices and leveraging intellectual property.
- Raise pitchbook quality by ensuring consistency and compliance.
- Respond to opportunities more quickly by improving team communication, collaboration, and approval processes.
- Minimize deployment costs by taking advantage of existing investments in familiar Microsoft technology.

Solution Capabilities

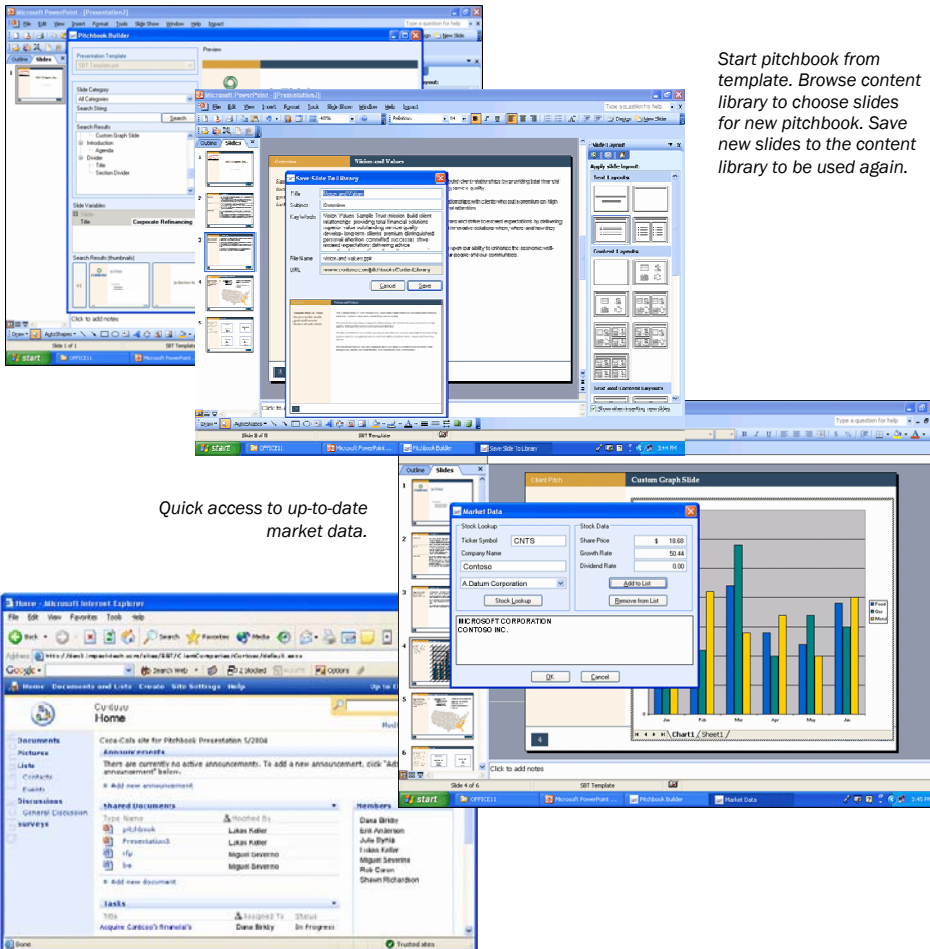
Presentation Automation

Templates, content libraries, and built-in features from desktop applications can automate many manual, time-consuming processes for faster pitchbook creation. These features can enable:

- Faster pitchbook assembly with the re-use of approved slides.
- Faster slide development with automated data population tools.
- More compliant pitchbooks through the use of standard templates and graphics.
- Better presentations with consistent access to the most current information.
- Reduced training with the use of familiar desktop tools.

Advanced Modeling and Data Integration

Key technologies and data from both internal and external sources can be integrated directly and automatically into the pitchbooks.



Quick access to up-to-date market data.

Start pitchbook from template. Browse content library to choose slides for new pitchbook. Save new slides to the content library to be used again.

Building Better Investment Banking Pitchbooks Faster

A pitchbooks solution based on the Microsoft Office System can give investment banks a competitive edge by helping them to create more compelling, consistent, current, and compliant pitchbooks. A solution can decrease pitchbook preparation time, improve pitchbook quality, and help investment banks respond to opportunities faster.

Next Steps

To learn more about Building Investment Banking Pitchbooks Faster using the Microsoft Office System visit:

www.microsoft.com/office/showcase/pitchbooks

Solution Showcase for the Microsoft Office System

Investment Banking Pitchbooks is one of the many business scenarios available in the Solution Showcase for the Microsoft Office System. The Solution Showcase highlights examples of how leading organizations can solve business problems using the Microsoft Office System. The Solution Showcase provides guidance so Microsoft customers can obtain more value from their investments in the Microsoft Office System, and provides a featured listing of Microsoft partners who can help customers design, build, and implement Microsoft Office-based solutions.

For more information about the Solution Showcase, see:

www.microsoft.com/office/showcase

- More timely presentations with ability to easily add or change data.
- More accurate presentations with automated data updates.
- Better presentations through in-context analysis.
- Faster turnaround time through integrated chart creation and formatting.

Single Collaboration Location

A more effective approach to collaboration streamlines pitchbook creation. With a common location for information sharing, task

management, issue tracking and scheduling, team processes are more organized and transparent.

- More efficient teamwork through central location for tasks, issues, and schedules.
- More consistent presentations through easily accessible templates.
- Continuous process improvement through a central environment for sharing ideas and best practices.
- Better team communication and less reliance on e-mail.