



National City Private Client Group needed a tool that would allow them to deliver professional looking, consistently branded presentations that included approved company collateral to be used by the sales force throughout their footprint. Metrics Marketing provided a solution that is in use by 650 Private Client Group associates and was used to generate 4,000 profiles in 2008.



National City Bank "Presentation Compiler" Presentation Tool

May 2009

The Challenge

Private Client Group had several hundred client associates who used different tools to create content for client presentations. The result was inconsistent data, branding, and formatting presented to clients — all proving to be a constant struggle for the corporate marketing team.

Metrics Marketing Group

905 Corporate Way
Suite 250
Westlake, OH 44145

Phone: 877.332.9222
www.metricsmarketing.com

“The Presentation Tool not only put the power of creating custom presentations in our sales force’s hands, but it also allowed our marketing department to be less intrusive in the process while maintaining full control. I didn’t think that was possible.”

Kathy Henning,
Private Client Group

The Solution

Development and implementation of an Online Sales Tool Application that could be completely managed by the client and featured:

- Administrative functionality to upload, manage, and change content based on user rights.
- User functionality that allowed for presentations to be created with a common look and feel; and delivery of consistent messaging. Also gave users the ability to share presentation.
- Reporting functionality to present usage reports based on volume.
- Third-party integration for up-to-the-minute financial data from live data feeds.
 - Approved content is uploaded and managed by central area.
 - Presentations can be customized to meet various client needs.
 - Users can manage multiple presentations at a time, create new presentation based off standardized templates, or make copies of past presentations.

The Results

National City has successfully rolled out Presentation Compiler tool to over 650 users. In 2008, over 4,000 presentations were generated.

Metrics Marketing Group

905 Corporate Way
Suite 250
Westlake, OH 44145

Phone: 877.332.9222
www.metricsmarketing.com