



Barrow Hanley Drives Efficiencies with Assette Software for Client, Sales, and Digital Communications

BOSTON, MA, UNITED STATES, September 28 2023 – [Barrow Hanley Global Investors](#) a global asset management firm is using Assette software to bring a more modern and streamlined approach to how they engage with their clients. Using Assette has significantly improved efficiency and productivity for the firm.

“Using Assette software has significantly improved the efficiency and accuracy of our client reporting and sales materials production processes. What used to take several days, now takes several hours,” said Donna Simmel at Barrow Hanley. “This productivity savings is helping us drive business growth while continuing to deliver exceptional services to our clients.”

With more than \$46 billion in AUM* and 40+ years in the industry, the Barrow Hanley team has wide ranging and deep expertise to share with clients. From factsheets to client reports, and presentations, they have a distinct vision on client engagement. With Assette software they are bringing that vision to life and eliminating manual work that made scaling client communications challenging.

Prior to deploying Assette software, manually managing the creation, review, and delivery of this important content left little time for higher value client services and marketing activities. By automating the process, Barrow Hanley is enabling its teams to put their expertise to work on higher value client servicing and sales activities while centralizing quantitative and qualitative data into a single location.

The firm selected Assette because of its ease of use in designing and creating documents using marketer-friendly Microsoft Office, integration with existing tools, and its automated audit trails and approval processes.

Barrow Hanley is joining the growing number of asset management firms selecting Assette to put their data to work to create up-to-date, accurate, and customized client and sales content. Assette software automates the data enablement, content creation, approval, and delivery of a firm’s sales and client materials using their data platform of choice. Purpose-built for asset management, Assette software makes investment data accessible and easy-to-use, improving productivity for marketing, client service, and sales teams.

About Barrow Hanley

Barrow Hanley stewards the capital of corporate, public, multi-employer pension plans, mutual funds, endowments and foundations, and sovereign wealth funds across North America, Europe, Asia, Australia, and Africa. For further information, please visit www.barrowhanley.com

About Assette:

Headquartered in Boston, MA, Assette automates the data enablement, content creation, approval and delivery of an asset management firm's sales and client content using their data platform of choice. From first contact with a prospect to sharing perspective with long standing clients, firms can create, approve, and deliver sales materials, client reports, investment commentary, portal communications, DDQs and more in Assette software. For more information: www.Assette.com

*AUM August 31, 2023.