



Case study: Maseco | June 2011

MASECO Private Wealth Enhances Private Wealth Communications with ActivBoard 500 Pro

“The ActivBoard 500 Pro has given us a powerful and large format presentation medium which has helped streamline the communication of complex financial planning and portfolio options for our clients.”

MASECO Private Wealth develops and implements tax efficient global wealth and asset management strategies for US families and trusts. Based in London, MASECO was formed in 2008 and has rapidly grown to become one of the UK’s leading specialists in private wealth management for US citizens living in the UK.

MASECO
PRIVATE WEALTH

The Challenge

Established on the basis of putting clients first, MASECO follows four guiding principles which ensure the practice can continue to meet and exceed clients’ expectations: provide the highest quality objective recommendations; provide exceptional personalised service from experienced advisors; create an institutional product and service framework to source products and services from the marketplace; provide recommendations and services with transparent pricing.

Following a rapid period of growth, MASECO moved into prestigious new offices in central London. When preparing to move into these new premises, partner, Alex Eichhorn, used this as an opportunity to review the meeting room provision: “As the meeting rooms are where we engage with both existing and prospective clients, the environment had to provide the right facilities to communicate effectively with this audience.

“We looked at the classic presentation options such as plasma screens and dry whiteboards, but felt these were not the best tools for supporting the presentation of our products and services, which as they contain financial content, can be quite complex.”

Seeking a more modern alternative, Alex became aware of interactive whiteboards and more specifically – the Promethean ActivBoard 500 Pro series.

The Solution

As the very latest in interactive whiteboard (IWB) technology, the ActivBoard 500 Pro series combines the precision of pen-operated IWBs with the intuitiveness of touch – creating a powerful and flexible presentation tool which fits seamlessly with the needs of a business environment.

Wanting to achieve maximum presentation impact, MASECO implemented the largest screen format available, the ActivBoard 587, as a fixed system with advanced ActivInspire software.

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With a system installed in each of the two new meeting rooms, Alex and the Maseco team feel they made the right investment: “We wanted longevity from the system so felt it important to invest in the very latest, and best, technology available. The ActivBoard 587 has been likened by the team to a ‘touch pad on the wall’, giving us access to an impressive multimedia tool and more importantly – a practical and effective presentation medium.”

Putting the power of multi-touch capability at the presenter’s fingertips, the ActivBoard 500 is a flexible and an intuitive system to use. For example, the ActivPen with full left-click / right-click mouse functionality delivers accuracy for handwriting, while the presenter can easily switch to ‘touch’ to manipulate content with gesture-like movements. Moreover, as the ActivBoard 500 can accommodate up to four users at the board at any one time, the system actively promotes increased collaboration with content.



Promethean ActivOffice changes the dynamics of the session

The Benefit

With both systems fully operational in MASECO’s new offices, the ActivBoard 587 is proving its worth in the presentation of detailed financial information: “Our advisors now always use the system for the presentation of our investment philosophy to new clients, presenting and reviewing financial plans and client portfolios. Using ActivInspire in conjunction with our third party financial packages helps to simplify the content for clients, particularly where we are explaining processes, which ultimately makes the presentation more modern and visually engaging.”

The sheer size of the ActivBoard 587 screen is also making the delivery of presentations at MASECO more effective: “Before the ActivBoard, we relied on paper documents and laptops to present information to clients. Aside from being a bit disjointed, as we had to jump between materials, the size of the laptop screen made it difficult to see detail. Now we simply pull everything up on the one screen, can jump between documents and use the ActivInspire software as a whiteboard to add emphasis where appropriate.

“There’s no more taking notes and then typing them up to distribute post-meeting. We simply launch the electronic flipchart in ActivInspire, record our notes and are then free to circulate as a PDF to whoever needs them. As well as creating a professional impression, the practical benefit of increasing the efficiency of information dissemination should not be underestimated. Finally we have found that the boards add an extra dimension to our internal business meetings allowing us to easily review documents, take notes and assemble our thoughts.”

Finding The Right Partner

LEB Partnership Ltd has worked with numerous financial institutions on the consultation, deployment and installation of Promethean’s interactive whiteboard technology. LEB Partnership’s expertise lies in its employees’ deep product knowledge and demonstration capacity, along with a high level of service for supply, installation and after sales training and support.

Alex enjoyed working with LEB who provided a constant point of communication with Promethean during the sales process and delivered an efficient post sales service including technical support and training.



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