

Morningstar

Client Success Story

Morningstar Streamlines Document Processes While Maintaining High Security

Challenge

The Morningstar platform allows financial professionals to maintain data, make trades, and track investments for their clients. They strive to provide a single source of truth — an information source that all parties trust as the basis for investing decisions. Their software does that very well, but Morningstar recognized that reporting on the data was an essential service that they must provide.

They looked for a reporting solution that allowed for personalized, branded communications. They needed software that used Morningstar-created data to deliver reports on behalf of their clients. The solution had to work within an automated workflow.

Morningstar prefers to offer a “business in a box” solution. They did not want their clients to deal with integration issues or have to train financial advisors on third party software to create the customer-facing documents that they needed. The reporting feature needed to be easy to deploy, allowing financial professionals to focus on their business and investor needs.

CLIENT

Morningstar

PARTNER

Experlogix

PRODUCTS AND SERVICES

Document Automation for
SugarCRM

Dynamics 365 Finance

BENEFITS

- Streamlined document processes
- Improved document consistency
- Improved customer experience

Solution

Experlogix Document Automation allows Morningstar to create their own document templates and quickly deploy them to their clients. Morningstar met their clients' key requirements by integrating their platform with Experlogix Document Automation. This allowed them to create reports that deliver the information investors wanted to see, while allowing the Morningstar clients to promote brand identity — and do it at scale.

Creating personalized reports one at a time is easy. Providing the same level of personalization and attention to detail for thousands of investors requires a comprehensive, full-featured solution, which Experlogix provides. Morningstar clients may not even be aware of Experlogix. To them, the reporting and support are part of the Morningstar platform.

Result

Morningstar now allows their clients to deliver useful, relevant reports to investors. They may deliver reports to a secure document location, allowing investors to retrieve them when they wish. Some reports include digital signature features.

Experlogix gave Morningstar the ability to enhance their relationships with their clients and gave their customers the same opportunity to do so with investors. Financial advisors can use Morningstar-created document templates or take advantage of the Microsoft Word add-in to design their own documents. The advisors now have the power to tell their story to many investors automatically while simultaneously promoting their own brand.

By including e-signatures, Morningstar-produced documents not only communicate critical information efficiently but also enable investor engagement and facilitate processes that lead to additional business for their financial advisor clients.

As a worldwide organization, Morningstar appreciates the support from Experlogix teams in Europe and North America. The company can get their questions answered or request technical help, regardless of the local time of day.

Want to learn more?

Speak with one of our experts.

Get Started



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“Your imagination is really the limit in terms of the reports you can create with Experlogix Document Automation. A great database that provides structure for personalized reporting along with Microsoft Word that allows companies to tailor the documents with a familiar and reliable tool is a powerful combination. All organizations need to do is define their workflow and implement the Experlogix solution.”

Dylan Navra

Managing Director at Morningstar

