



**SOME ASSEMBLY REQUIRED:**

**THE RFP PROCESS END-TO-END**

**RFP**

**PAICR** | THE ASSET  
MANAGEMENT  
MARKETING  
ASSOCIATION  
**2018 RFP SYMPOSIUM**

**MAY 7 | CONVENE PARK AVENUE**

**SOME ASSEMBLY REQUIRED:**

**THE RFP PROCESS END-TO-END**



## CONTENT MANAGEMENT MECHANICS

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**PAICR** | THE ASSET  
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# Agenda

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- **Survey Highlights**
- **Best Practices**
- **Examples**
- **Summary**

# **Survey Highlights**

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- **Majority Interested in Learning Best Practices**
- **50% Have Dedicated Content Manager(s) on RFP Team**
- **25% Say Content Management is Full-Time Position**
- **The Biggest Challenges in Content Management**
  - **Other Responsibilities**
  - **Receiving Updates from RFP Writers**

# Best Practices

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## Content Management Strategy

- Employ Technology to Manage and Maintain Content
- Establish Content Governance
- Monitor User Experience



## Environment

- ▣ Technology
- ▣ Administration
- ▣ Permissions

# Compliance and Governance

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## Standards

- ▣ Guidelines
- ▣ Procedures
- ▣ Audit and Reporting

# ■ User Experience

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## Accessibility

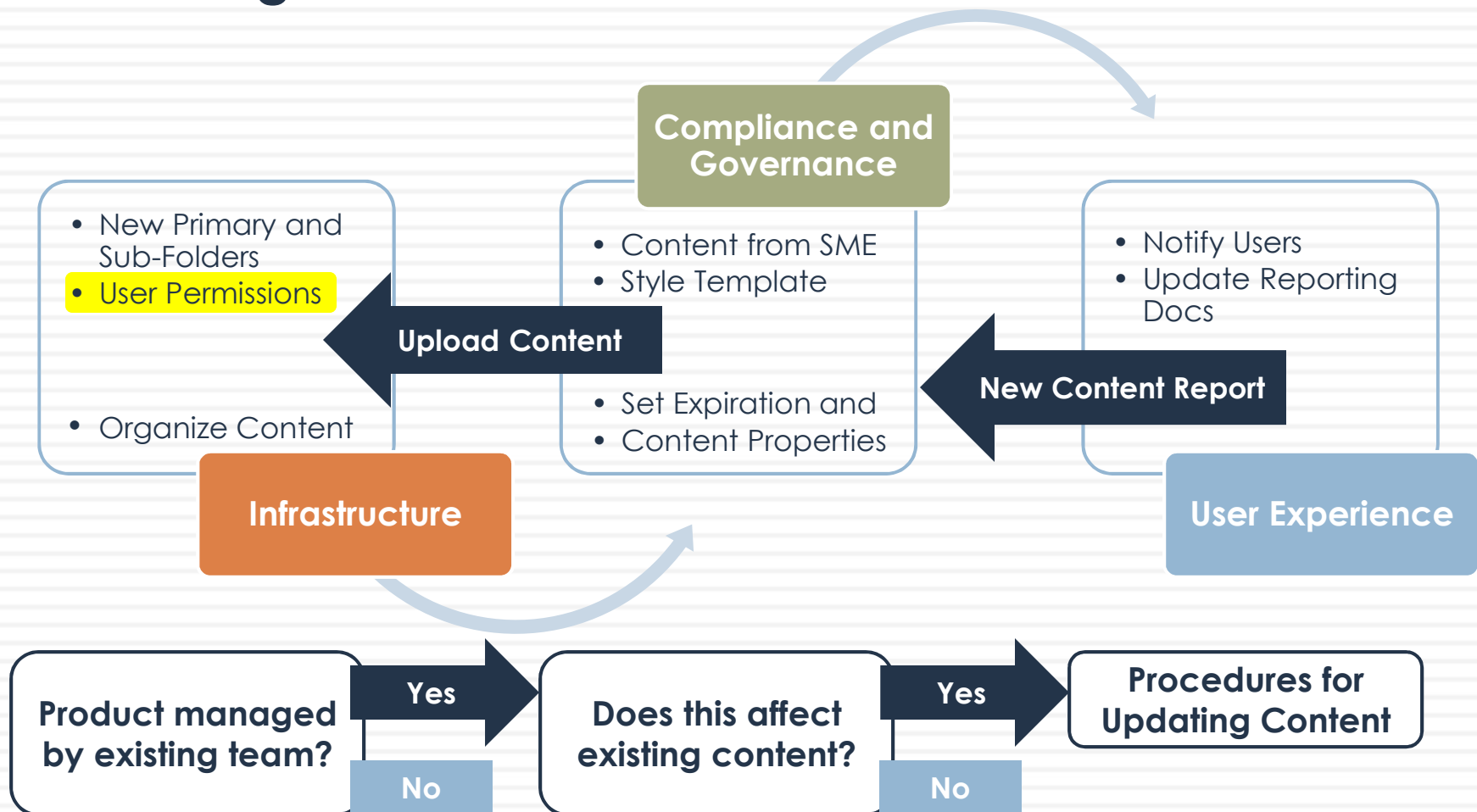
- ▣ Content Search
- ▣ Automation
- ▣ Training



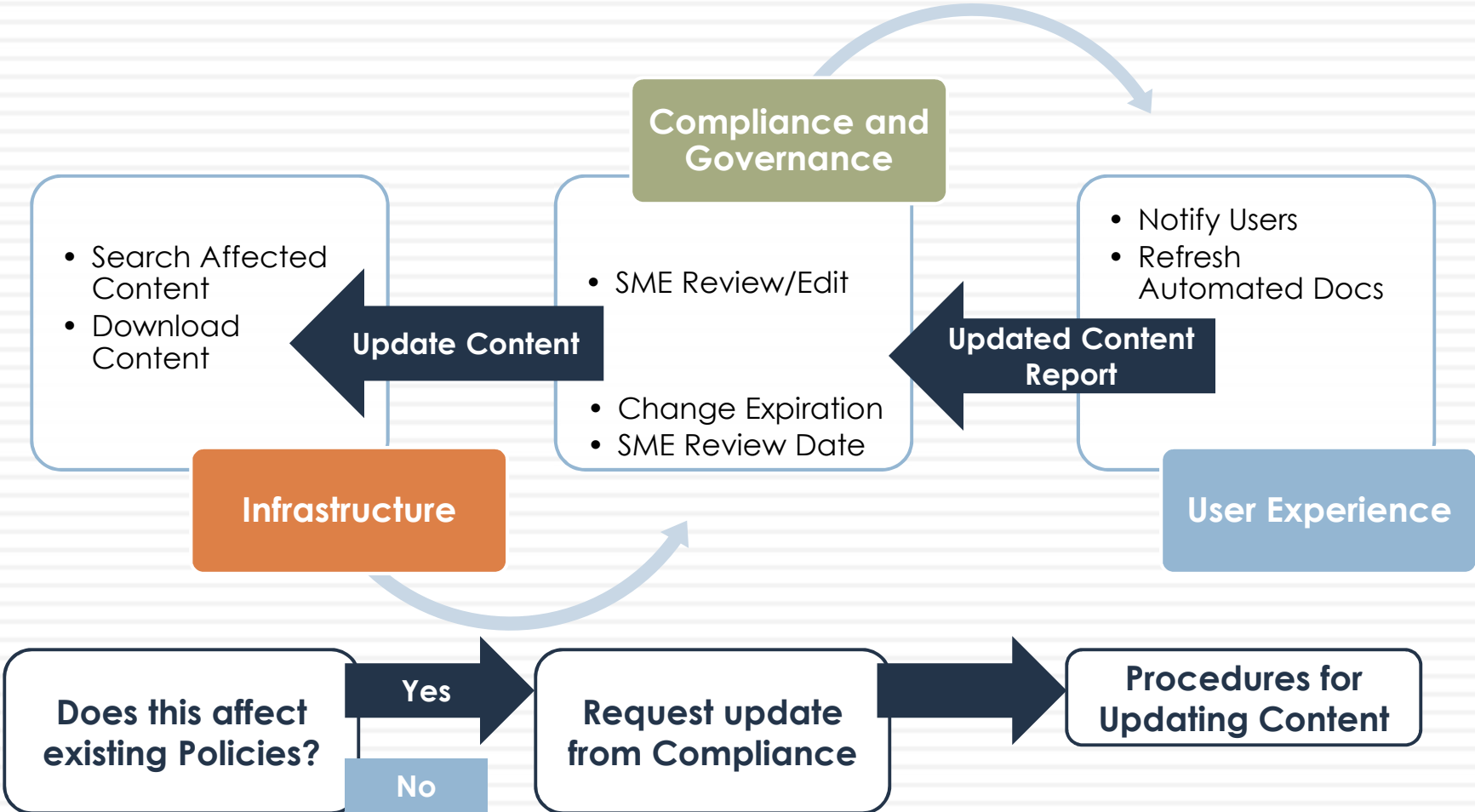
# Example 1

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## □ Adding New Product to CMS



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## Summary

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- ❑ **Define Content Management Strategy**
- ❑ **Utilize Technology and Create Efficiencies**
- ❑ **Maintain Strong Governance**
- ❑ **Ensure Positive User Experience**

# THANK YOU



Sources:

- Content Strategy Alliance | <https://contentstrategyalliance.com>
- Upland Qvidian | Product Help