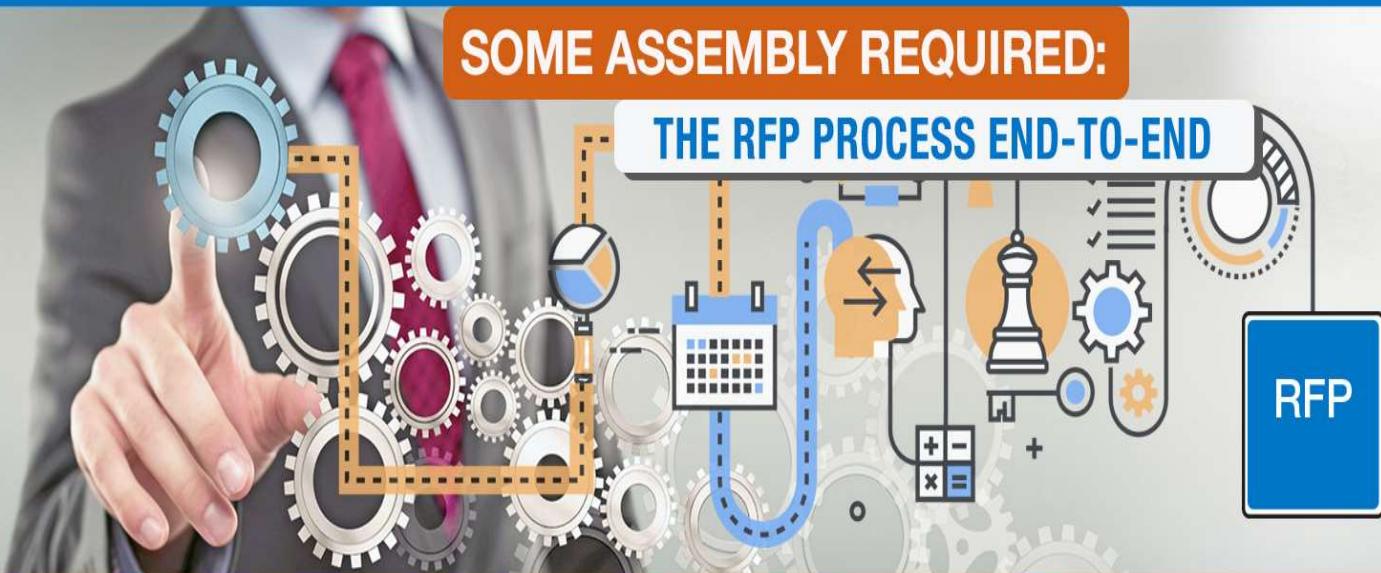


SOME ASSEMBLY REQUIRED:

THE RFP PROCESS END-TO-END

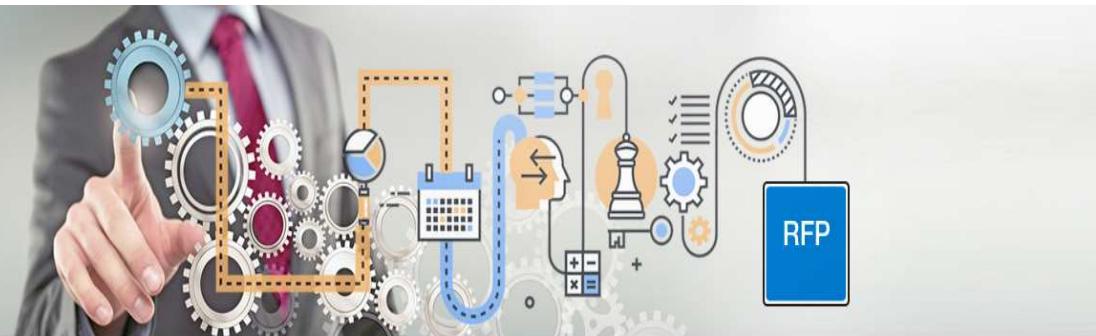


PAICR | THE ASSET  
MANAGEMENT  
MARKETING  
ASSOCIATION  
2018 RFP SYMPOSIUM

MAY 7 | CONVENE PARK AVENUE

SOME ASSEMBLY REQUIRED:

THE RFP PROCESS END-TO-END



## CONTENT MANAGEMENT MECHANICS

---

**Monica McGillicuddy,**  
Content Database Manager

Eaton Vance Management  
617.672.8990  
[mmcgillicuddy@eatonvance.com](mailto:mmcgillicuddy@eatonvance.com)

# ■ Agenda

2

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

# ■ Survey Highlights

3

- **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

4

## □ Content Management Strategy

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





## Environment

- ❑ Technology
- ❑ Administration
- ❑ Permissions

# ■ Compliance and Governance

6

## Standards

- Guidelines
- Procedures
- Audit and Reporting

## Accessibility

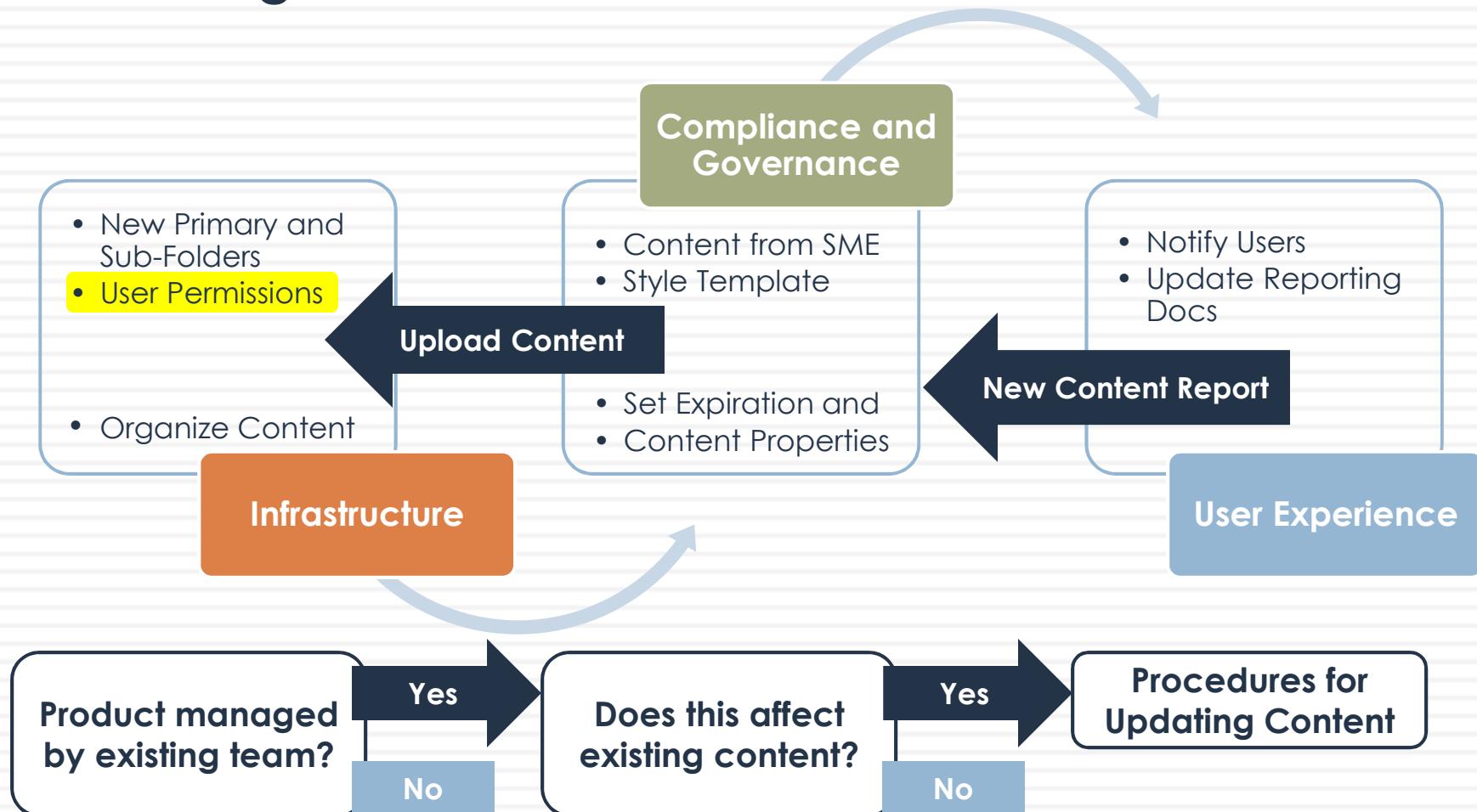
- ❑ Content Search
- ❑ Automation
- ❑ Training



# Example 1

8

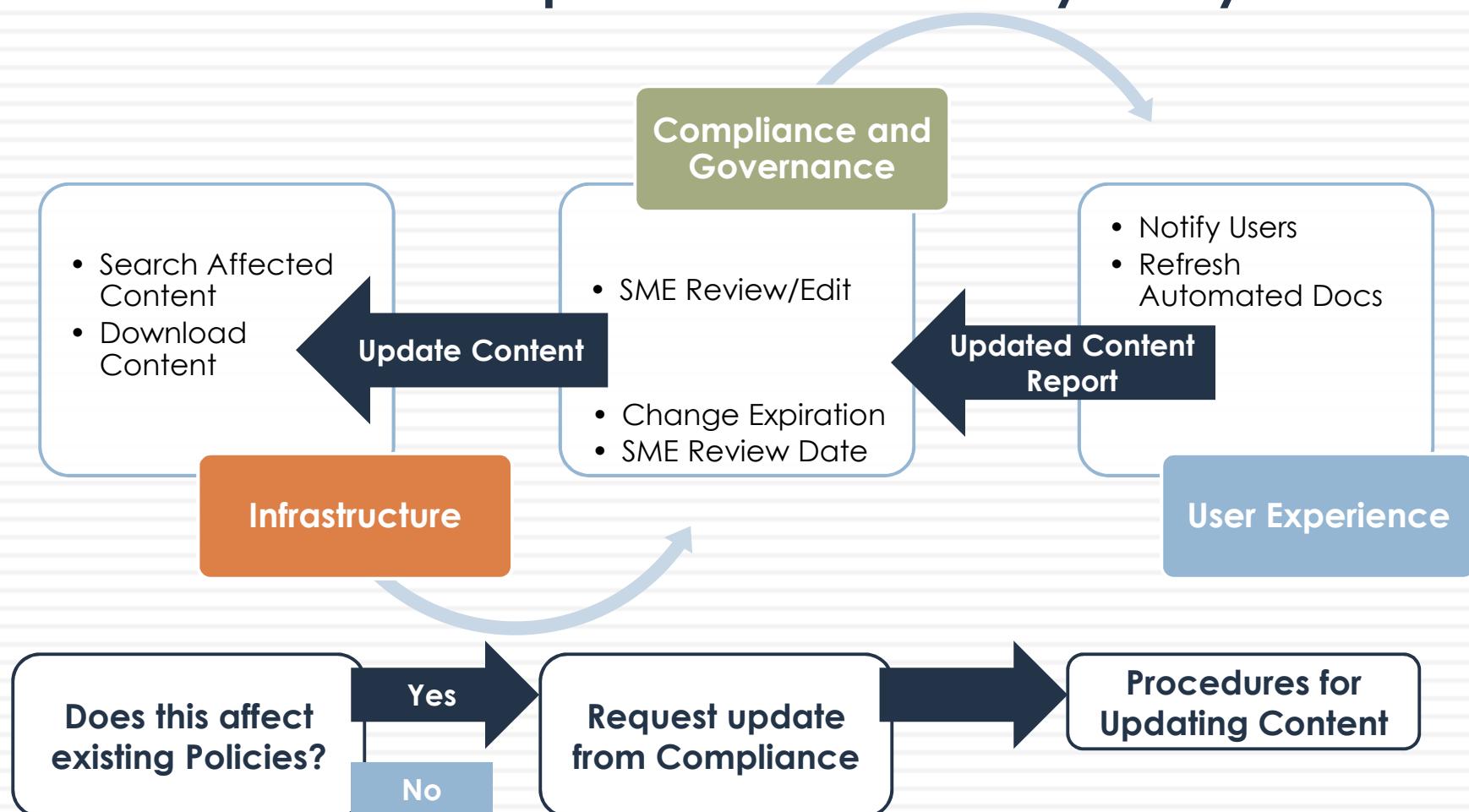
## □ Adding New Product to CMS



## Example 2

9

### Income Team Implements New Analytics System



# ■ Summary

10

- **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