

# John Hancock streamlines prospectus composition

## THE CHALLENGE

### Ineffective Document Management Impeded Performance

John Hancock Investment Management delivers a diverse set of investments with strong risk-adjusted returns across asset classes. The firm determined that their prospectus management system was no longer effective, disaffecting Legal and creating a ripple effect across departments.

The firm sought a single, fully automated solution to streamline content management, document creation, proofing and generation of all necessary outputs (i.e., PDFs, HTML, XBRL). They required that the new system immediately provide type and filing services and deliver library and document building services to reduce the workload for existing staff. These requirements were non-negotiable.

## THE SOLUTION

### Fully Automated Platform Simplified Workflow

John Hancock selected Broadridge DocuBuilder. The fully automated, web-accessed platform enables multiple users to collaborate and create, edit, approve and publish regulatory documents. The platform delivered excellent results for the firm:

- Saved 1,300 hours of combined time per year
- Achieved greater autonomy and control
- Filed HTML 2-3 days before day 120
- Reduced filing and distribution costs

Years after implementation, DocuBuilder continues to transform the firm's regulatory document management process, elevating it to a standard commensurate with the John Hancock Investment Management brand.

## KEY ADVANTAGES FOR ASSET MANAGERS

### Transform Document Creation

A single automated publishing solution expedites regulatory document creation with expert accuracy and increased speed. Teams can break free from system constraints and easily collaborate across departments using automation to edit, re-purpose and publish time-sensitive materials.

### Simplify Content Updating for Multiple Outputs

A flexible cloud-based platform eliminates tedious, manual steps to keep content compliant and aligned across documents and outputs. This streamlined user experience allows for quicker content editing through simultaneous updates across all documents that feature the same content.

### Optimize Efficiency to Cut Costs

Operational expenditures can be significantly reduced by eliminating unpredictable charges for proofs, black-lining, alterations and pre-press setup. A fully automated solution preserves document and content integrity while creating an audit trail for billing and accountability.

## CORE BENEFITS

### John Hancock selected DocuBuilder based on:

- Ease of use
- Cost of ownership and overall value
- Superior iXBRL capabilities and process
- Expertise and support during pilot period

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## A PHASED APPROACH TO TRANSFORMATION

John Hancock Investment Management had two non-negotiable requirements for implementing a new solution:

- Immediately engage in providing type and filing services in place of current provider
- Provide library and document building services to reduce the on-boarding workload for existing staff

Broadridge effectively responded to both non-negotiable requirements by facilitating a seamless transition from the firm's existing supplier without any delays in production. A traditional production module was quickly established to deliver typeset and filing services for 3,000 pages of material that would be created over the next six months. Simultaneously, the team launched the implementation process for DocuBuilder.

## EXPERT SUPPORT FROM PILOT TO LAUNCH

To alleviate staff concerns with navigating a new system, Broadridge leveraged its professional services team to handle all content loading and document setup in DocuBuilder. Our team prioritized a thorough understanding of the firm's documents and disclosures. We developed an intuitive naming convention for components and assisted in establishing workflow and milestones around the first update cycle to be processed through the DocuBuilder platform.

Users were prepared for a successful launch with comprehensive training and all documents ready in the queue from the moment users accessed the live site. These efforts were reinforced via on-site support to ensure a seamless transition to DocuBuilder.

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**The Performance and Treasury teams recovered a combined 1,300 hours of time per year, cutting the review process time in half.**

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## DOCUBUILDER DELIVERS SIGNIFICANT GAINS FOR FIRM

Broadridge DocuBuilder has transformed the Legal department, facilitating simplified document updating and filing, eliminating inefficiencies and reducing stress. The firm has noted costs reductions associated with outputs and filing, outsourced projects and distributions. These improved efficiencies have enabled timely and simplified invoicing for accurate accounting of expenses and the ability to maximize early payment discounts.

The Performance and Treasury teams have recovered a combined 1,300 hours of time per year, cutting the review process time in half due to confidence of uploads. The firm delivers stronger reporting to company leadership through DocuBuilder by tracking performance efficiencies, cost savings and opportunities for growth.

Discover how Broadridge can help you improve the speed and accuracy of your marketing and regulatory operations.

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