

EXPEDIENCE Spotlight



KEELEY ASSET MANAGEMENT CORP.

Word® Based Document Automation Solution a “Market Disrupter”

COMPANY

Keeley Asset Management Corp.

INDUSTRY

Asset Management Firm
Flagship Product: Small Value Portfolio

PROJECT LEAD

Brent O’Neil
Sr. Client Services Associate

CRITICAL ISSUE

Creating a simple, effective and efficient RFP, questionnaire and compliance review process for the firm.

THE COMPANY

Keeley Asset Management Corp. is a boutique investment firm located in Chicago. Mr. John Keeley, Jr. developed the firm’s flagship corporate restructuring investment style for U.S. equities (small, mid, and all-cap).

The firm offers research capabilities including dividend-paying small and mid-cap strategies. Today, Keeley manages approximately \$5 billion in assets and employs 14 investment professionals averaging 25 years of investment experience.

CURRENT SITUATION

In the investment industry, quality and efficient responses to requests for information are essential to maintaining a competitive advantage. After difficulties in attempting to house the core content within an Excel document and referring to old RFPs and questionnaires for responses, Keeley turned to using a commercial web-based cloud solution.

According to Brent O’Neil, Sr. Client Services Associate, “The Cloud-based system was inefficient and labor-intensive. It required a great learning curve and the use of cumbersome back-end systems. It took a dedicated resource to maintain the quality and consistency of the content within the system which imposed a burden on a firm with a limited number of people resources. We had to find a way to decrease our turnaround times and use our resources more efficiently.”

SOLUTION : *Improve Quality and Efficiency with Expedience Software Solutions.*

Expedience Software has tackled the primary challenges of document au-



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Keeley Asset Management Corp.*

tomation: time to delivery and quality of response all within the simple familiar interface of Word®.

In the first year after implementing Expedience solutions, Keeley has cut turnaround response time between 25 – 50%. Not only has the turnaround time decreased, but the quality has also improved. O’Neil attributes the simplicity of the Word® based solution for their ability to clearly articulate the value proposition with a unified consistent message throughout the entire organization. “We are impressed with this Word® based product that is overall a simple, efficient tool used to create a library of qualitative information available for the firm to access and deploy at any time. Simply open Word® and find and insert the answer.

A recent compliance cycle was completed easily. The batch detail was printed out in 5 minutes for review by the compliance manager. Edits were indicated and the changes were made within the Word® portal. The Expedience solution is simple, very fluid and fun to use.”

O’Neil concluded, “The Expedience solution is recognized by our firm as a market disrupter in the RFP/RFI automation industry offering products and services that leapfrog current technology and provide simple solutions to complex or long-standing technical or practical problems.”

ABOUT EXPEDIENCE SOFTWARE

The Expedience Software Suite provides the ideal solution for RFP/RFI response, due diligence questionnaires, compliance review, and sales proposal fulfillment. Expedience allows proposal professionals to create timely, accurate, attractive proposals and other compelling documents using only one software platform – the simplicity of Microsoft Word®.

Expedience Software is recognized as a market innovator in the RFP/RFI automation industry providing simple solutions to respond quickly and accurately to revenue opportunities resulting in a greater volume of responses and increased win-rates. Expedience Software serves financial services, asset management, healthcare, legal, business services, manufacturing and technology organizations.



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