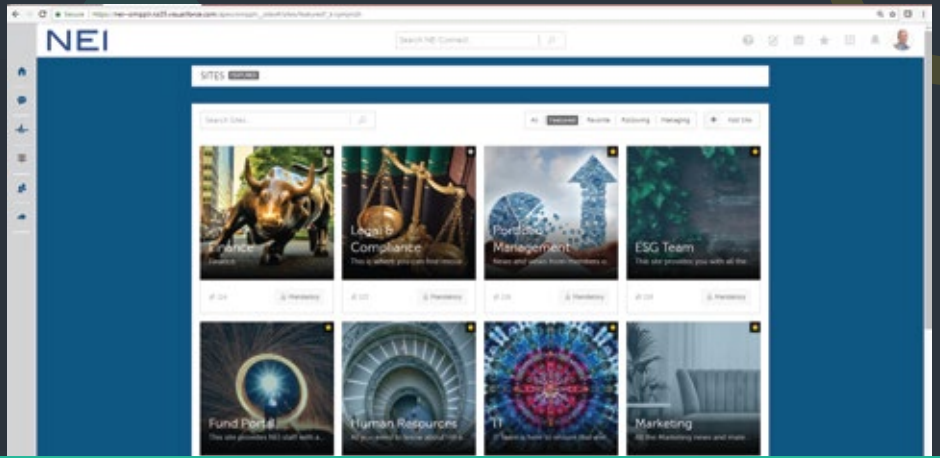


# NEI Investments achieves world-class employee retention with Simpplr



“With Simpplr, our employees feel more connected to NEI’s purpose and strategy. All of our content is easy to access and easy to keep up to date. This has not only improved employee productivity but has also dramatically increased employee engagement and overall satisfaction scores.” - Steve Wylie, Director, Digital Strategy and Marketing

## About NEI Investments

NEI Investments (NEI) is a mutual fund company that is committed to making excellent, independent portfolio managers accessible to Canadian retail investors through three competitive fund families: NEI Funds, Northwest Funds, and Ethical Funds. With true active management and a relentless, disciplined focus on risk management, NEI strives to deliver superior risk-adjusted returns to investors as they work toward their financial goals and a secure future. NEI is headquartered in Toronto and has approximately \$6.5 billion in assets under management.

## The Challenge

As a socially responsible investment fund, NEI’s purpose and company culture are key factors in attracting and retaining top talent. This is something the company has done very well; it has repeatedly been named a Great Place To Work Canada.



Communicating across multiple office locations



Significant remote workforce



Employees began to surface communication challenges

In recent years, NEI has grown, becoming more geographically dispersed, with offices across Canada and many remote employees. Connecting employees in three corporate offices and numerous home offices was a challenge. Users were getting burned out on email. Important news was easy to ignore and delete. Communications seemed unilateral, with little

two-way dialogue. Departments operated in silos. Relying on shared network drives was a challenge for salespeople trying to find content on the road. Version control was a difficult when many people relied on their email archive to find content. With no platform for collaboration and communication, HR, marketing, finance, and many other teams were answering the same questions over and over.

Ultimately, NEI’s annual Employee Satisfaction Survey surfaced the urgency of improving internal communications. The status quo had employees feeling increasingly disconnected from NEI’s mission and vision. The firm could not afford to let this challenge affect the culture and ultimately its ability to attract and retain talent.

# NEI empowers its workforce with Simpplr

## The Solution

All roads led to deploying a centralized intranet. NEI also had a Salesforce CRM initiative under way and wanted to ensure that its intranet solution integrated well with other tools across the digital workplace. NEI evaluated several options, including building a portal internally, configuring a Salesforce extension using Salesforce Communities, and evaluating fully functional intranet providers. At a high level, the company was looking for tight Salesforce integration with single sign-on; accessibility across mobile, tablet, and desktop devices; the ability to easily refresh and update content; and the ability to easily navigate employee profiles and directories.

Ultimately, NEI chose the Simpplr platform because it had every one of the required capabilities, was the easiest option to deploy (without heavy overhead), and proved to be the best approach toward fixing communication and content management challenges.

The Simpplr site, internally branded NEI Connect, was deployed ahead of Salesforce even though the CRM initiative had launched long before. The deployment was completed within 10 weeks, with the bulk of that time focused on rationalizing content, refreshing material, and organizing sites based on user need. Once deployed, the NEI spread site ownership across 14 department sites. Within months of deploying, NEI Connect's daily adoption rate exceeded world-class standards, with more than 70 percent of employees logging in daily.



70% of users log in daily



Deployment completed in 10 weeks



Site ownership dispersed across 14 departments

## The Results

NEI's internal culture committee, a team that is dedicated to monitoring employee morale and engagement, has noted dramatic improvement in employee communications.

Across the company, NEI has been able to sunset legacy shared drives. This has saved administrators countless hours dealing with version control and trying to maintain multiple content repositories. Moreover, the distributed administrative approach has helped lighten the load of the central HR and marketing project leads; oversight and maintenance take less than five hours per week. NEI also cut the number of company aliases by a staggering 40 percent, which not only eases administrative burden but also fosters a greater sense of transparency across the organization.

Across locations and departments, NEI's collaborative spirit is thriving. Survey scores related to communication and feeling connected to the business have dramatically increased.

Ultimately, the intranet strategy has reinforced NEI's commitment to company culture, communication, and delivering an exceptional client experience.



Employee retention exceeds industry average



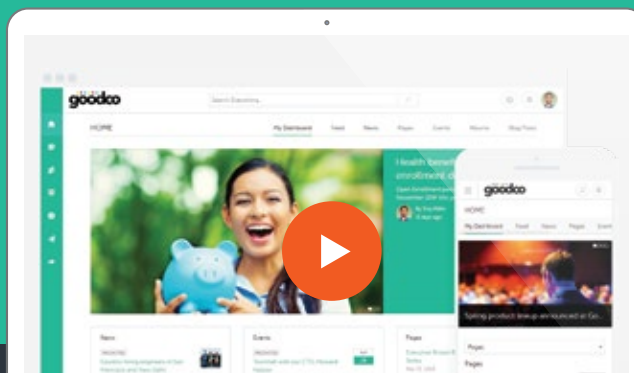
Reduced email volume



Increased collaboration across geos and departments

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