
Industry	Financial Services
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Founded	2010
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Headquarters	Toronto, Canada
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The logo for NEI Investments, consisting of the letters "NEI" in white, bold, sans-serif font, centered within a black square.

NEI Investments achieves world-class employee retention with Simppplr



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.

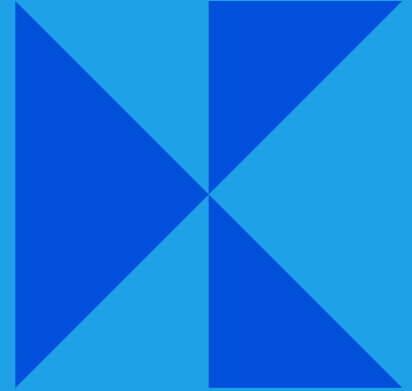
Steve Wylie

Digital Strategy and Marketing



The Challenge

When disconnection threatens the culture



Communicating across multiple office locations

Significant remote workforce

Employees began to surface communication challenges

As a socially responsible investment fund, NEI's purpose and company culture are key factors in attracting and retaining top talent.

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. 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.

The Solution

Staying in touch seamlessly



70% of users log in daily

Deployment completed in 10 weeks

Site ownership dispersed across 14 departments

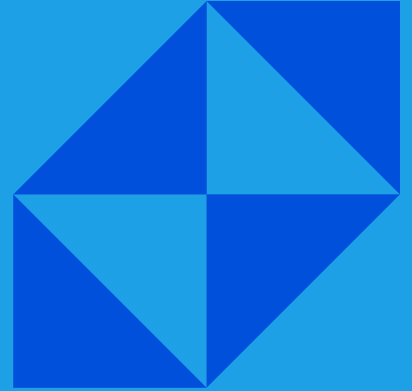
All roads led to deploying a centralized intranet. NEI also had a Salesforce CRM initiative under way and wanted to ensure that its intranet solution integrated well with other tools across the digital workplace. NEI evaluated several options, including building a portal internally, configuring a Salesforce 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 Simplr 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 Simplr 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.

The Results

From 0-70% in eight weeks



Successful eight-week implementation

Reduced email volume

Increased collaboration across geos
and departments

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

NEI has been able to sunset legacy shared drives, saving 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.

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. NEI is headquartered in Toronto and has approximately \$6.5 billion in assets under management.

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About Simplr

Simplr is the leading AI-powered employee experience platform. Organizations use our forward-looking, adaptable products to deliver personalized experiences that inspire and engage their employees. Wherever people work, Simplr enables them to flourish.

Trusted by more than 500+ leading brands, including Zoom, Snowflake, Moderna, Eurostar, and AAA, our customers are achieving measurable productivity gains, increased employee engagement, and accelerated business performance.

Simplr is headquartered in Silicon Valley, CA with offices in the UK, Canada, and India, and is backed by Norwest Venture Partners, Salesforce Ventures, and Tola Capital. Learn more at simplr.com.