CENTRL CASE STUDY · MEETING PREP AGENT

Four weeks of meeting prep, now done in hours

FIRM	TEAM	COVERAGE	DEPLOYED
Multi-asset manager, $40B AUM	3-person Investor Relations group	15 investor meetings targeted for APAC visit	4 weeks

1 mo → hours
Prep cycle for 15 APAC investor meeting packs

1,400+ hrs
Analyst hours returned annually

100%
Claims footnoted to a source document

+55%
Capacity unlock, same activities, less human effort

THE CHALLENGE

Every investor meeting started with three weeks of assembly work.

Preparing for an investor roadshow in APAC meant pulling the latest DDQs from the VDR, the current factsheets from email, performance and holdings, prior meeting notes from the CRM, and open diligence items from a spreadsheet, then reconciling it all into an agenda and a question-and-answer list per meeting. Three analysts, roughly four weeks of elapsed time, and the packs were often stale by the day of the meeting.

Prep quality depended on who did it.
Follow-ups from the last meeting were regularly missed.

BEFORE / AFTER

Source gathering	5 systems by hand → connected, agent-pulled
Elapsed time	~4 weeks → under 1 Hour
People per pack	3 analysts → 1 reviewer
Question list	Rebuilt each time → generated from open items
Traceability	Manual footnoting → citation on every claim

WHAT THE MEETING PREP AGENT DOES

One run, four steps, reviewer in control

Gather
Pulls DDQs, factsheets, performance, holdings, notes and emails from connected systems

Reconcile
Flags what changed since the last meeting — strategy, terms, team, exposures, open items

Draft
Produces the briefing pack, agenda and question list in the firm's own template

Review
Analyst edits with every claim linked to its source, then signs off in one pass

RESULTS AFTER TWO QUARTERS

Sales effectiveness on existing clients. Increased growth, x-sell and retention by 10% on current relationships.

Expansion of addressable business. Covered more opportunities and smaller mandates through increased capacity and automation.

Bigger share of wallet. 8% deeper penetration via more relevant recommendations.

Analysts back on judgment. Reclaimed time went into deeper diligence and 55% more investor outreach

> "We used to block out months before an investor roadshow. Now the packs are waiting for us, sourced, and the only thing left is the thinking."
>
> Head of Investor Relations
> Multi-asset manager, $40B AUM