**GLOBAL BANK**

SIMPLIFYING AND STREAMLINING THE CONTENT SUPPLY CHAIN

One of the world's largest and most well-known investment banks faced a strategic challenge – increased competition, in an increasingly regulated environment, from smaller and more focused wealth management firms that offered new and alternative products. To meet aggressive growth goals and empower advisors to deliver the high-end experience that clients expected, the bank needed to ensure advisors had world-class product knowledge so they could deliver compelling stories to clients and beat the competition.

■ The Problem

Despite millions of dollars invested in content creation, content management with Savo (now Seismic), and workflow systems to deliver sales content, advisors could not stay up to date with all the information that mattered to them and struggled to teach their clients new insights. Two core issues stood in the way of making the team's white-glove vision a reality:

1. Email was the core communication mechanism between product, marketing, and investment teams and the wealth managers, which created a huge information access challenge.

2. Marketing and IT partnered to create a centralized content repository based on Savo (now Seismic), but gave up on the initiative after four years because the manual work to manage the system couldn't handle compliance pressures and all the new content created by various teams.
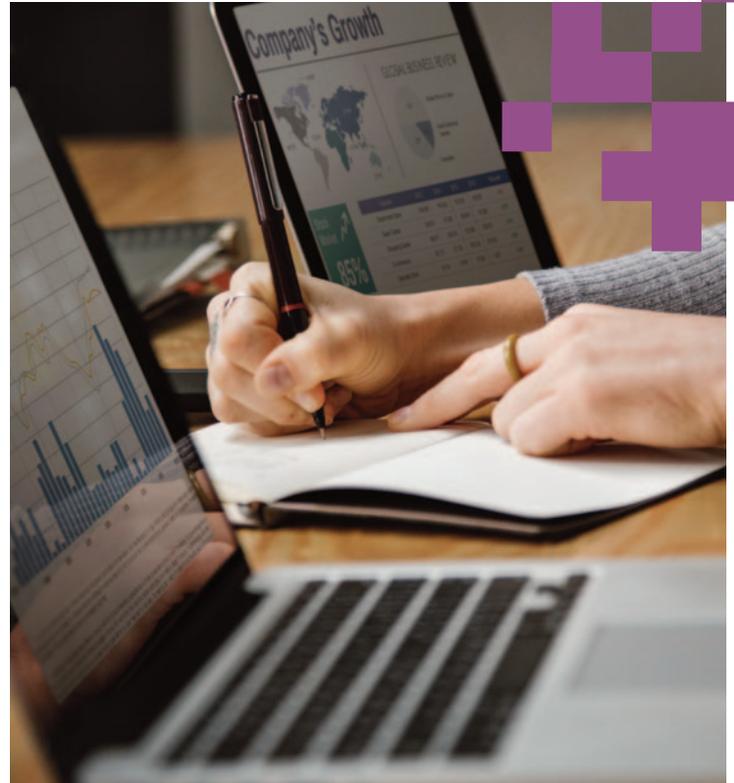
■ Organizational and Product Complexity

The organizational and product complexity associated with solving the core issues was massive. To fully solve it, the team at the investment bank needed to:

- Ensure that 10,000 advisors across 60+ countries receive the most relevant information for their unique selling situation in an easy-to-use way.

- Give advisors the tools to tailor the product portfolio, messaging, and services for their individual client's needs.

- Streamline the creation, dissemination, frequent updates, and consumption of marketing content, which is created by distributed teams.

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■ Why Docurated?

The team at the investment bank initially evaluated 17 solutions and narrowed their list to two vendors: Docurated and Seismic – for a pilot, product comparison, and user acceptance testing. At the end of the pilot, the bank issued a survey to end users to provide feedback. Eighty six percent of users preferred Docurated over Seismic.

Other selection factors included:

- **Fast rollout:** Taking into account the highly complex nature of the investment bank's content infrastructure, Docurated was fully implemented in four weeks. The bank expected a Seismic rollout to take over a year.

- **Enterprise scale and flexibility:** Docurated was built to take the heavy lifting of support and usage away from the end user.

- **Compliance and Control:** Docurated enabled the investment bank to overlay their compliance rules on all content and ensured that any non-compliant materials were corrected.

- **Contextually relevant results:** Fundamental to an accurate recommendations engine is a large body of data from which to draw inferences. Docurated collects data from across the enterprise, not just a couple of applications, which is the Seismic model.

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> WE WERE FILLING INBOXES WITH TOO MANY ANNOUNCEMENTS. REPS IGNORED WHAT WE SENT AND USED THE PUBLIC WEB TO SOURCE CONTENT. THIS CREATED A BIG COMPLIANCE RISK. THANKS TO DOCURATED, IN LESS THAN A MONTH, WE PUT REPS IN THE BEST POSITION TO SUCCEED WITH UP-TO-DATE NEWS AND INFORMATION, PERSONALLY CURATED AND INSTANTLY ACCESSIBLE.
>
> – MANAGING DIRECTOR, GLOBAL INVESTMENT BANK
> "

- **Automatic content categorization:** Uses machine learning (ML) to suggest how new and existing content should be categorized. This content tagging and organization task once kept marketing teams busy for thousands of hours.

- **Template Creation:** Marketing now has the ability to make a change in one place and propagate that change to all presentations in the field where that data point was used.

ABOUT QUARK SOFTWARE INC.

Quark Software Inc. develops a content automation platform that helps large organizations streamline the creation, management, publishing and delivery of business-critical content. Our solutions automate the process with reusable Smart Content components that can be dynamically assembled and delivered with precision in any format and to any channel — web, tablet, mobile, print, and more. As a result, leaders in industries such as finance, manufacturing, energy, and government can reduce costs, save time, improve consistency and make their content brilliant.

To find out more about Quark Enterprise Solutions visit **www.quark.com**

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