

Global Investment Management Firm

Financial Services

Company Profile

Challenges

Solution

Results



Financial Services

This 200-year old Fortune 500 financial institution is one of the world's largest custody banks & investment management firms.

100

Markets



35

Countries

\$29T

Assets in Custody

\$1.6T

Assets under Management

\$1T

Daily Transactions

Financial Services

The Bank offers investment services, investment management, wealth management, securities, exchange, brokerage & capital market services.



Banks



Governments



Corporations



Small
Businesses



Broker / Dealers



Individuals
& Families



Advisors



Non Profits

Challenges

The Bank's entire digital strategy needed to modernize.



Poor user experiences

- Not personalized
- Not easy to navigate or explore
- Not mobile, not social

Not global

- Inconsistent brand across web properties
- No content standards enforced

Hard to manage

- Publishing process hard for marketing teams
- No analysis or insights from site data
- Security risks from shared web infrastructure

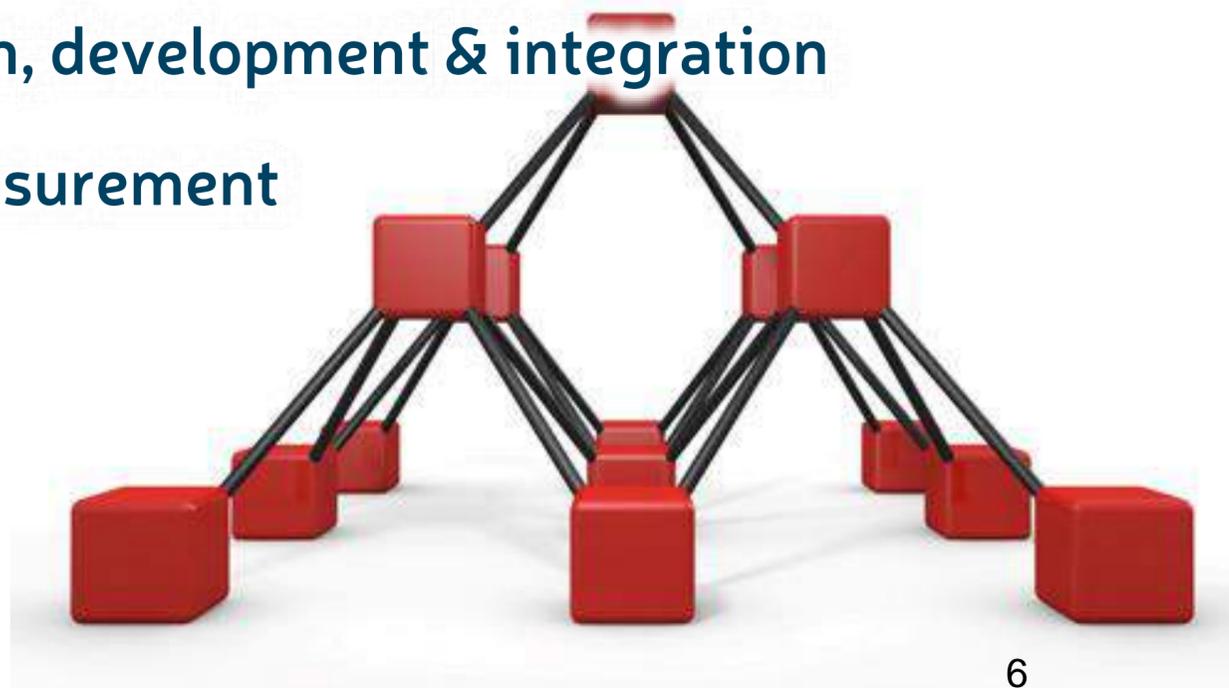
The Bank's digital marketing team faced some challenges.

Needed to partner with external providers for expertise in...

- Research and discovery (including content audit)
- Digital user experience design (including persona development)
- Website design, development & integration
- Analytics, measurement & reporting

Needed to make strategic organizational changes...

- Strengthen collaboration between IT & Marketing
- Introduced new marketing roles in analytics & user experience
- Set up corporate brand governance structure
- Trained internal business users on strategy, new tools & best practices
- Provide ongoing reporting on analytics & insights



The Bank needed...

A single enterprise-grade DXM platform worldwide

- Experience delivery that started from the visitor's POV
- Content management serving multiple customer types
- Multiple bank divisions hosted on one central platform
- Support for parallel site development efforts across divisions with different teams & agencies
- Consistent brand & content standards across all sites

Solution Requirements:

- ✓ *Global reach & scale*
- ✓ *Localization support*
- ✓ *Marketing ease-of-use*
- ✓ *Key integrations support*
- ✓ *Mobile responsive*
- ✓ *Analytics support*
- ✓ *Dedicated infrastructure*



Solution

CrownPeak **chosen because its platform...**

WEB EXPERIENCE MANAGEMENT

...Fulfilled marketing's demand for global brand consistency.

...Scaled to easily handle multiple divisions.

...Gave worldwide teams the ability to localize experiences.

...Delivered flexible, responsive, dedicated site infrastructure.

...Handled integrations with 3rd party tools & internal services.

...Supported analytics dashboard to track key KPIs.



NEW CORPORATE WEBSITE LAUNCHED FAST!

Global Investment Management Firm

90

Days to Implement Live Site from Final Design

20

Countries

7

Languages



25,000

Content Assets Migrated to New Library

Key Integrations:

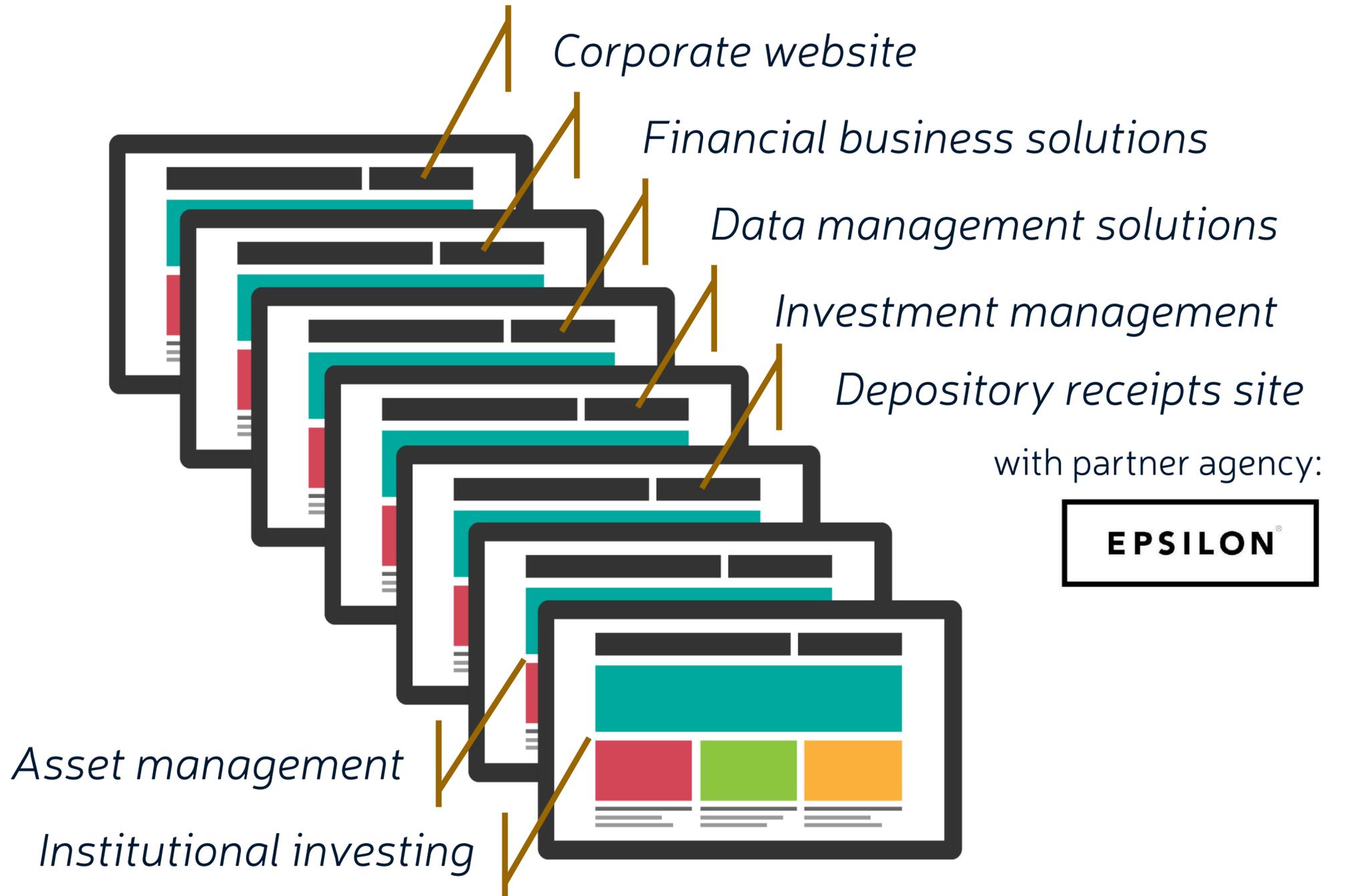


Partner Agencies:



Unified Cloud DXM around the Globe

- Expanded launch of multiple divisions, regional sites & microsites
- Concurrent projects developed in parallel on shared platform
- Regional agencies worked with local marketing teams
- Digital experiences connected across channels (web, mobile, social...)
- Governance & compliance enforced as mandated by local jurisdiction, brand standards & best practices



A Simple Implementation Approach

1. A single shared website framework with common components, modules and templates.
2. A single CMS instance handles all content customization at the local level with centralized control.
3. Rollout of new sites is fast, manageable and mobile-ready. Little to no coding is required.



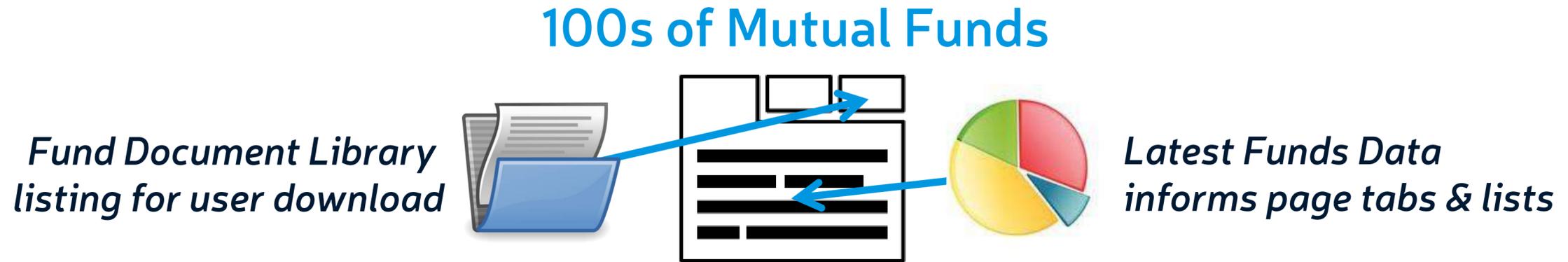
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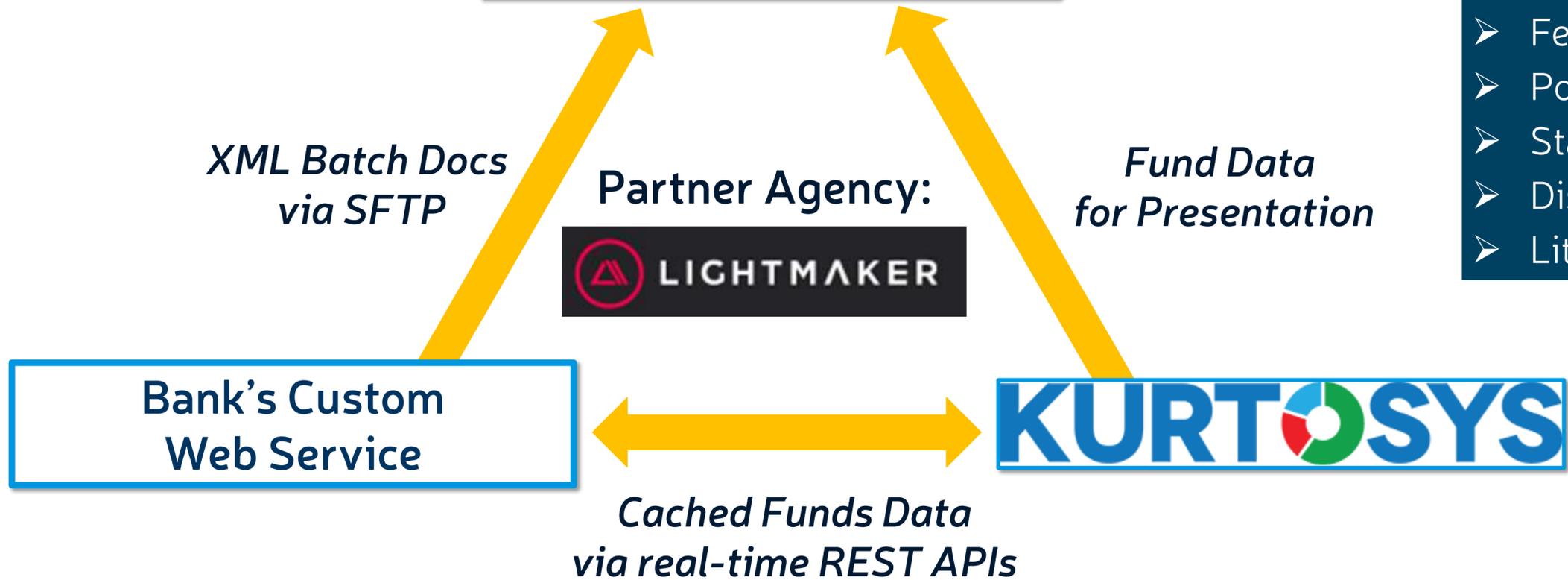
Individuals & Families



Advisors



- Fund Info Includes:**
- Overview
 - Performance
 - Fees & Expenses
 - Portfolio
 - Stats & Risk
 - Distributions
 - Literature



CrownPeak delivers for all of The Bank's stakeholders.

WEB EXPERIENCE MANAGEMENT

- ✓ Single shared platform
- ✓ Global brand standards
- ✓ User targeted content
- ✓ Richer digital experiences
- ✓ Multi-channel delivery
- ✓ Tested, tracked, optimized

250

Authors & Users
Worldwide



Results



90%

Increase in web operations productivity of marketing staff

74%

Increase in content consumption across web / mobile

24%

Increase in both unique visitors & lead conversions

75%

Increase in brand awareness

90%

Reduction in operating costs of launching / managing DXM

90%

Reduction in IT operating costs with DXM cloud platform

DON'T TAKE OUR WORD FOR IT...



Research by 

“CrownPeak has allowed us as Marketers to focus on Marketing and the client experience vs. IT infrastructure and “wish lists” of enhancements that never get delivered. Now we are able to continuously monitor and enhance the user experience and helping our stakeholders better engage their audiences and better realize the value of the channel.”

Source:  Managing Director of Digital Marketing, Large Enterprise Financial Services Company

Published: **Mar. 24, 2016**

TVID: **045-B36-A7F**



Research by 

“CrownPeak has allowed us to provide a scalable site that is secure.”

Source:  Digital Marketing Director, Global 500 Banking Company

Published: **Aug. 17, 2015**

TVID: **492-699-915**

Here's your checklist to repeat The Bank's success at your organization...

- ❑ Get management's blessing.
Securing executive sponsorship of the initiative will ensure that you lead from the top, down.
- ❑ Listen to your audience.
Begin from the user's point of point, not inside-out. By understanding your visitors and clients better, your content will be more relevant, more engaging and spur conversion.
- ❑ Share the recipe, not the kitchen.
Avoid "too many cooks" when it comes to designing digital experiences, BUT make sure you socialize the plan with key internal stakeholders across the institution.
- ❑ Shoot for the moon first, then the stars.
Start from scratch if necessary, but develop an achievable strategy before committing precious resources and investment. Start small and then expand in waves.
- ❑ Measure only what's important.
Uncover the key performance indicators that really drive conversion and keep existing clients happy. Measure your success only against these insights and ignore the noise.
- ❑ Keep experimenting!
What is new doesn't always have to be innovative. Test new digital experiences, keep what works.

1. How long does it take your customers to launch new websites globally?
2. How do you enable marketers to manage the brand centrally, but provide local regions the ability to tailor the experience for their unique audience?
3. What kinds of resources are required to support these local regions?
4. How do multiple teams like agencies, IT or local marketers collaborate on your DXM platform?
5. Do you support team collaboration across regions or outside your company's firewall?
6. Do we need to rely on IT resources to customize and change our site, or can marketing teams handle this when desired?
7. Do you guarantee system uptime in your service level agreements?
8. How does your vendor help you address regulatory issues specific to your industry?

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ABOUT CROWNPEAK

CrownPeak is the leading cloud platform for digital experience management at enterprise scope and scale. Leading digital marketers at global enterprises use CrownPeak's SaaS digital experience management platform to deliver exceptional digital customer experiences, manage global touch points and integrate web properties with other content and legacy platforms. CrownPeak's unique hybrid cloud platform offers a secure, scalable and extremely agile means to develop, deploy and manage world class digital experiences. Among the companies in the CrownPeak client roster today are AFLAC, AIG, Diageo, Eli Lilly, Kaiser Permanente, MetLife, Men's Wearhouse, PineBridge Investments and Prudential. For more information, please visit: <http://www.crownpeak.com>.

