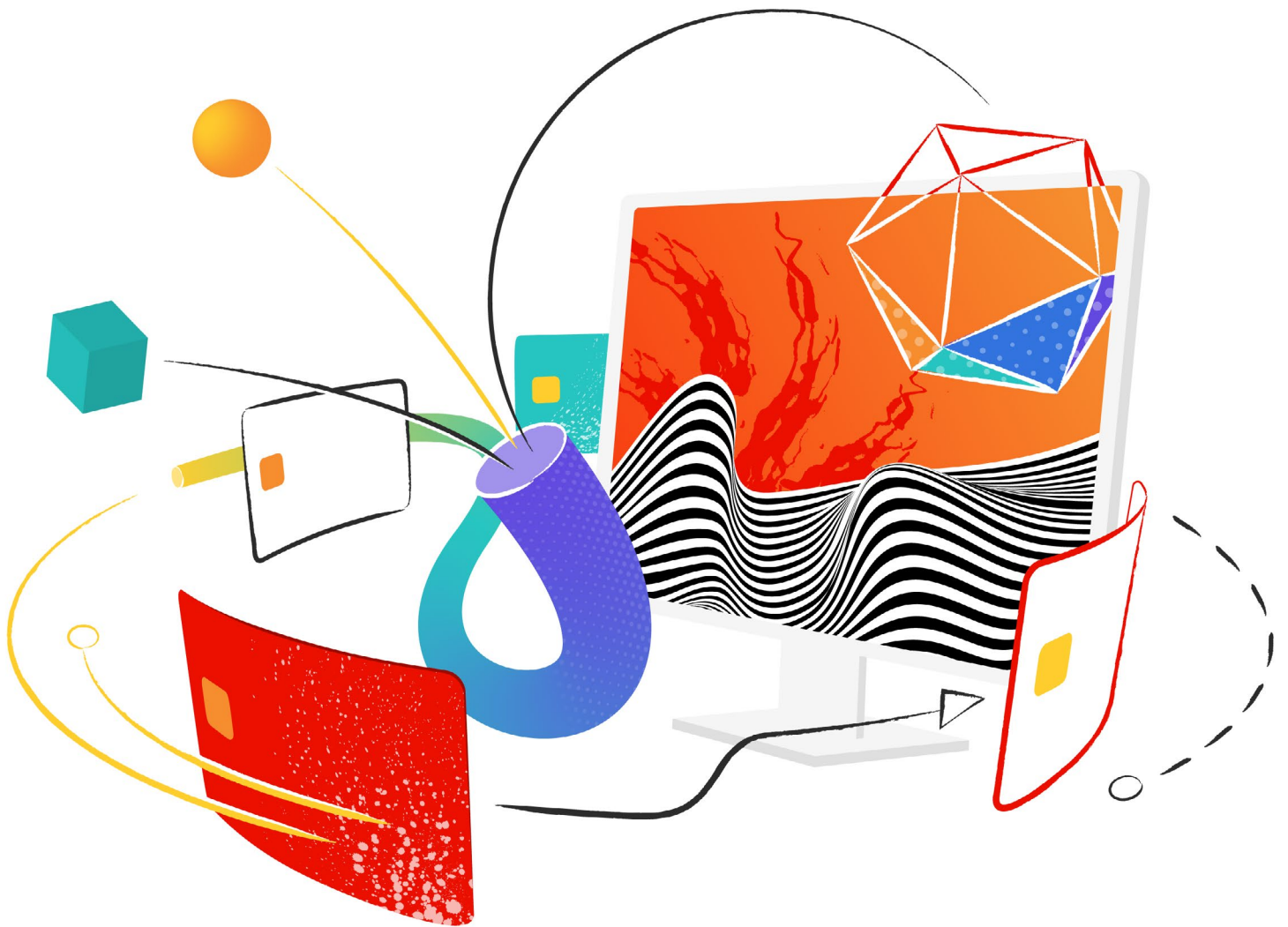


# Surpass the competition in financial services with complete and seamless collaboration.



# Contents

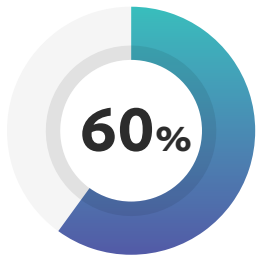
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## INTRODUCTION

**In 2020, the COVID-19 pandemic led to a sudden acceleration in digitisation and digital engagement in financial services.**

This has forced many in the industry to think more strategically about their technical setup, posing the question: are the tools you're relying on enough to meet the shifting needs of your business and your customers?

In this short guide, we'll explore the key marketing challenges faced by your financial organisation in 2021. We'll then demonstrate how Adobe Workfront will help you overcome them with the ability to streamline compliance approvals, meet the shifting expectations of your clients, increase operational efficiency, drive down cost, and deliver better brand experiences.



60% of respondents who used online banking more during lockdown say they are likely to continue doing so at the same frequency once restrictions have been lifted.<sup>1</sup>



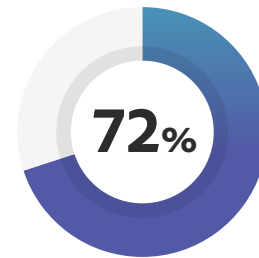
## SECTION 1

# Connect the organisation for agile delivery.

Legacy systems present one of the largest barriers to agility for businesses in the financial services industry.

These technologies not only hinder collaboration, innovation, and knowledge sharing, but they also increase costs associated with operations, risk management, and compliance.

To combat these challenges, financial service firms must identify and invest in technologies that replace siloed approaches and connect the organisation's processes whilst maximising operational efficiency. This approach will help you optimise and refine your market offerings in-line with the shifting needs and expectations of your consumers.



72% of firms said managing multiple CRM systems across geographies and technology silos is moderately to extremely challenging, and that "the greatest challenge organisations face in meeting their marketing and sales objectives is managing data and sharing insights that drive actions across organisational silos."<sup>2</sup>

## Here's how you can overcome these issues...

The most effective way to conquer the challenges presented by legacy systems is to connect your enterprise work, collaboration, and digital content into one marketing system of record.

This will help your business maximise agility, reduce time to market, and ensure a constant connection with its customers.

By centralising marketing projects, you can unify teams with a single point of truth, eliminate silos, and ensure the right information gets to the right people, at the right time.

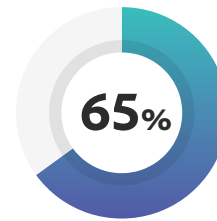
This will also empower your employees by enabling access to the latest campaign data and information, streamlining amends and sign-off processes whilst ensuring all content adheres to regulatory guidelines.

## SECTION 2

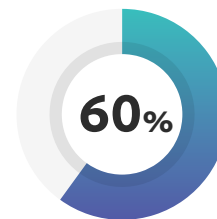
# Maximise efficiency and streamline operations.

Producing truly engaging content requires a significant amount of time and resources, as content creators need to test, execute, and measure the effectiveness of their projects, and then optimise their approach based on results.

However, creating content that keeps pace with ever-changing consumer demands is increasingly challenging for marketers in the finance industry, as inefficient processes hinder both creativity and productivity.



65% of marketers find it hard to produce engaging content



60% find it hard to produce content consistently.<sup>3</sup>

Research conducted by the Content Marketing Institute (CMI) revealed that...

# 9 in 10



content marketers cite **"changing priorities and unclear briefs"** as one of the main challenges they face.

This includes **"drive-by projects or last-minute changes introduced by managers who were late to the sign-off process"**, which influences their **"content's emotional impact, customer priority alignment, quality of copywriting, and business results."**<sup>4</sup>

## Here's how you can overcome these issues...

Investing in a work management application will help your business evolve complex marketing programs and campaigns to meet changing demands faster than ever. With the power to optimise budgets, iteratively plan and prioritise, track work progress and dependencies, and quickly respond to market forces, you can ensure every one of your campaigns stays on track.

You can also use this solution to define clear priorities and scale cross-functional deliverables with predictability and ease, turn ideas into better content faster and with fewer hassles, eliminate guesswork, spot conflicts that can delay your work, and ensure you and your team deliver on time, every time.

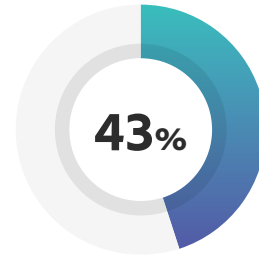
## SECTION 3

# Deliver quality content—and more of it.

**In the wake of the pandemic, the demand for quality content in financial services has skyrocketed.**

But meeting this demand is proving increasingly challenging for marketers in the industry, as remote working has impacted creative teams' ability to produce content quickly and collaboratively.

This need for collaboration in the financial services industry is particularly important, as content creators often require the support of industry experts and client-facing professionals to ensure every project is truly valuable, accurate, useful, and accessible.



During the pandemic, there was a 43% increase in content consumption by B2B customers and prospects.<sup>5</sup>

## Here's how you can overcome these issues...

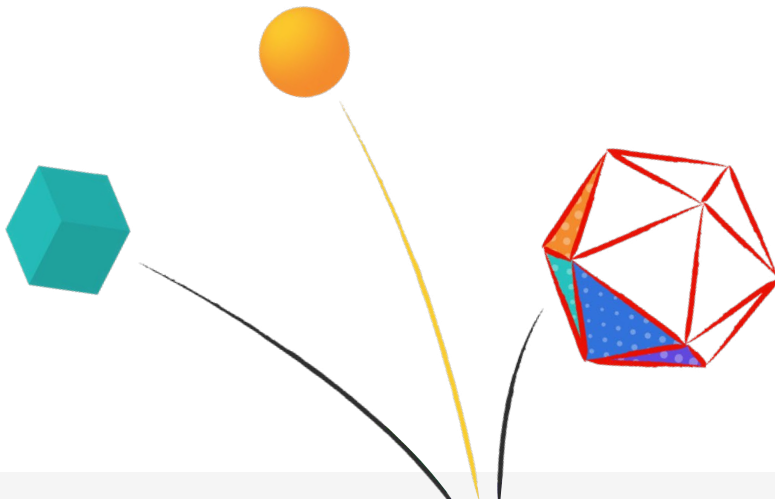
Delivering outstanding content in high quantities is no easy feat—but there are a number of things you can do to ease the strain.

**First, identify the right message that needs to be brought to market.**

This will help you to unify all stakeholders and employees—ensuring seamless collaboration and keeping everyone focused on the same goal.

**Next, invest in a centralised solution for managing, creating, executing, and collaborating on all creative work throughout the entire work lifecycle.**

It will help you maximise investment and deliver against your demand requirements. It will also enable you to increase content quantity and quality by automating processes, tying project information to assets, simplifying digital reviews and approvals, and providing real-time status updates.



## SECTION 4

# Ensure ongoing compliance.

Clear governance rules are vital for any marketing strategy, as they ensure that all assets are compliant with both brand and legal guidelines, and that customer trust is maintained.

**In financial services though, this level of compliance can slow down sign-off processes if managed incorrectly.**

In times of crisis (as we've seen over the past twelve months), the frequency of your marketing comms has likely only increased—but this doesn't mean compliance has become any less stringent; if anything, it's more so. What you need is a way to speed up your time-to-market by boosting the capacity of your marketing teams, a way to automate best practice, and a way to standardise process tailored to your needs and regulatory criteria.

## Here's how you can overcome these issues...

With many stakeholders required to provide feedback and give sign-off as part of the approvals process, you need a reliable way to streamline compliance audits.

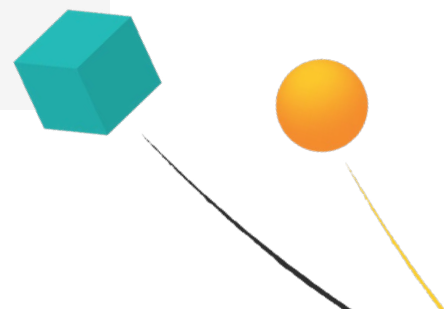
A work management application creates an audit trail to speed up the online proofing and approvals processes. It also automates certain aspects of the process to help you increase content velocity and quality.

**A work management solution that connects with Adobe Experience Manager provides a central location to store all final pieces of collateral, logos, designs, and of course, the latest compliance requirements such as FAIS.**

With an easily accessible reference point for your whole team, you can rapidly create engaging creative that is both consistent with branding and compliant with regulations.



In 2020-2021, the UK Treasury Department proposed to tighten regulations on advertising and promoting financial services and products, including those related to cryptocurrencies.<sup>6</sup>



# Adobe Workfront—the work management application for financial services.

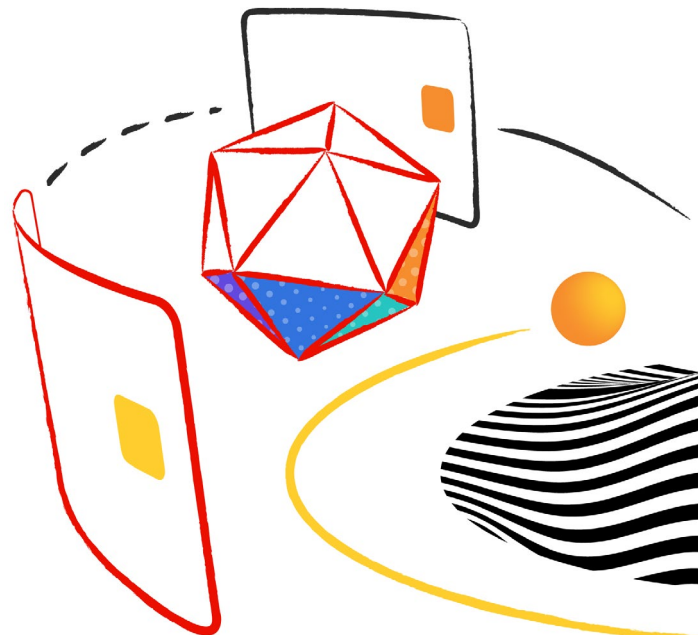
With Adobe Workfront, you can overcome all the challenges presented in this guide with a single, powerful solution. Workfront gives financial services organisations the power to meet shifting client expectations, supercharge operational efficiency, streamline compliance, drive down cost, and ultimately, deliver better brand experiences.

Workfront connects seamlessly to any Adobe application, including Adobe Marketo Engage, Adobe Campaign, and Adobe Analytics, providing creatives and marketers with the tools they need to collaborate seamlessly with colleagues in-house, and deliver content that offers true strategic value—whilst also optimising the sign-off process and ensuring compliance to stringent regulations. In turn, this will free up time and resources so your business can accelerate the agility and speed at which you adapt to change, and implement the latest customer-centric technologies.

With a centralised solution for managing, creating, executing, and collaborating on all creative projects throughout the work lifecycle, you can simplify digital reviews, make sure the right people are working on the right tasks, and prove impact with real-time insights into the volume, velocity, and value of work being done across your business.

Get in touch with us today to find out more about how Workfront can help you become a market leader in financial services.

[Get in touch](#)





## Sources

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