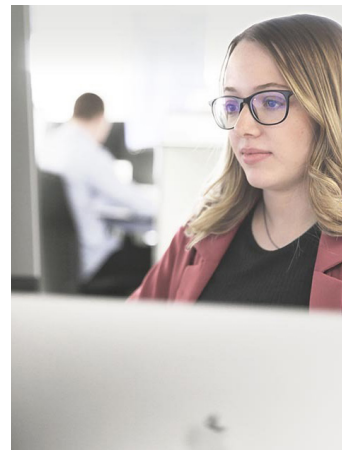
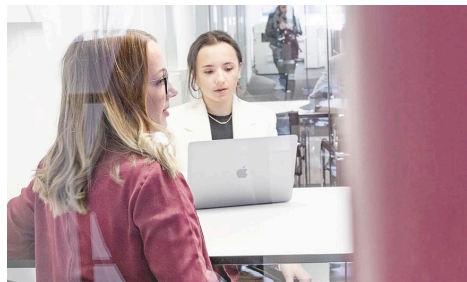
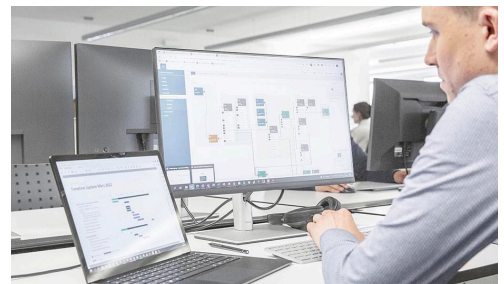


# REDUCING RISKS AND UNLOCKING POTENTIAL

**Intelligent Content Management Platforms  
as a Success Factor in the Financial Sector**



Is your company among the winners or losers of the content challenge? Real-time content has the power to strengthen customer loyalty and increase revenue. The losers, on the other hand, are unable to respond quickly enough to market developments and the growing expectations of their clients.

Our perspective on this: minimise risks and unlock potential in your content management. Those who embrace this approach are able to master the content challenge and its associated demands better than ever before. And not only that: they enhance sales/ advisor productivity and optimise the customer experience. It's worth delving deeper into this topic.

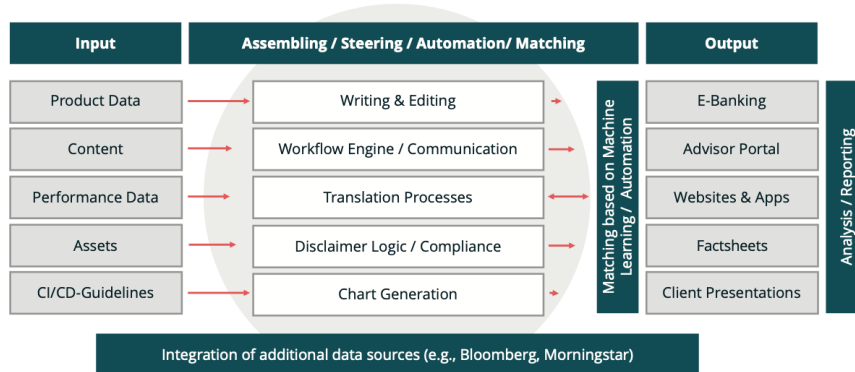
## NAVIGATING THE CONTENT JUNGLE WITH CENTRALISED SYSTEM SOLUTIONS

For many years, we have been supporting various financial institutions in the field of modernising their enterprise content management.

A closer look at existing solutions and processes often reveals an alarming reality: regulatory requirements are frequently only partially met. Systems and processes are too slow to react to changes and market events in timely manner. The degree of personalisa-

tion in customer communications can only be achieved through significant manual effort by consultants, which is not sustainable in the long term. Analysis and evaluation of how content is used by consultants and clients are often not possible. Additionally, organisations are deploying AI assistants to support their advisors, which require a well-categorised content database as the basis for content preparation. As a result, the use of content management solutions as a strategic tool has increased significantly – along with the demands placed on them by financial service providers.

Traditional tasks of content management systems, such as publishing a variety of media types and formats, providing dynamically automated layouts, and structuring information, are now increasingly managed with centralised systems as complexity increases. In addition, there are newer requirements such as company-wide content lifecycle management, holistic and integrated information access, and, crucially, intelligent content-to-customer matching and timely delivery of that content. Modern content management platforms connect users, processes, and content across the organisation, as well as with clients and partners. The result: an optimised customer experience through personalised "near real-time" content and improved productivity of financial advisors.



**Modern Enterprise Content Management.**

## EFFICIENT CONTENT MANAGEMENT IN THE FINANCIAL SECTOR

More and more financial companies are working on improving their content management – not just to advance process digitalisation and achieve productivity gains, but above all to provide clients with better digital investment and product advice.

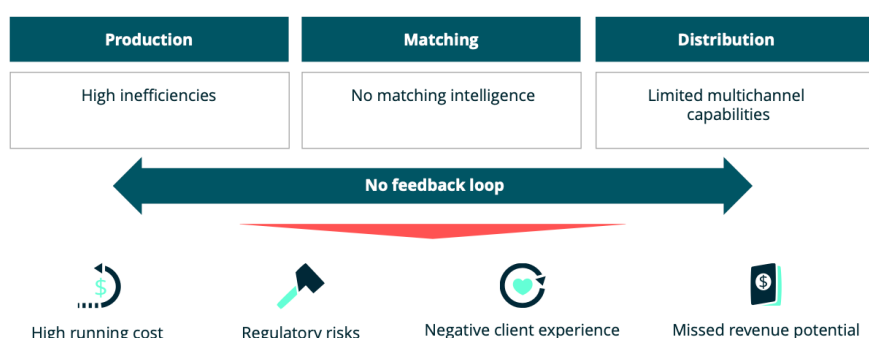
Our experience shows that many banks, insurance companies, and other financial service providers still rely on outdated processes and are far from exploiting the potential of automation:

- Content creation processes remain largely manual and the use of AI as part of content authoring is very limited.
- Combining text modules, graphics, charts, and disclaimers/disclosures for publication is only partially automated and handled via separate in-house systems.

- Intelligent, automated matching of content to customer profiles and needs is still in its infancy.
- Content delivery lacks the logic to automatically supply the right channels with the relevant content in the correct format.
- Coordinating and distributing content across various channels is highly resource-intensive.

Financial institutions are looking to exploit modern solutions to simplify work and increase efficiency for their content editors, investment writers, marketing teams, advisors, and other stakeholders.

We have long advised financial service providers on content management, implementing tailored central strategic solutions. In doing so, we analyse the following four processes – production, matching, distribution, and feedback loop – to identify pain points, define system and process requirements, and exploit optimisation potential in a targeted, step-by-step manner.



**Essential pain points in current Enterprise Content Management processes, which negatively affect customer experience and profitability.**

## PRODUCTION

### Reducing costs with automated content production

One of the leading private banks we support in Switzerland updates over 8000 factsheet variants every month, along with countless client presentations and other sales materials in multiple languages. These documents often contain an editorial on current market conditions and an outlook, charts and diagrams on product composition and performance, and legal information such as disclaimers, which vary by region. Previously, updates were extremely labour-intensive, with processes and tasks carried out manually across different systems. Today, creation and updating of these materials are largely automated, resulting in significant time savings.

On top of these regular content formats produced on a schedule, there is also a big need for authoring ad-hoc investment content such as general advice, alerts, notifications, editorial content, and many other types that need to be produced in parallel – putting strain on the capacity of content teams and creating a demand to manage various different content types all at once.

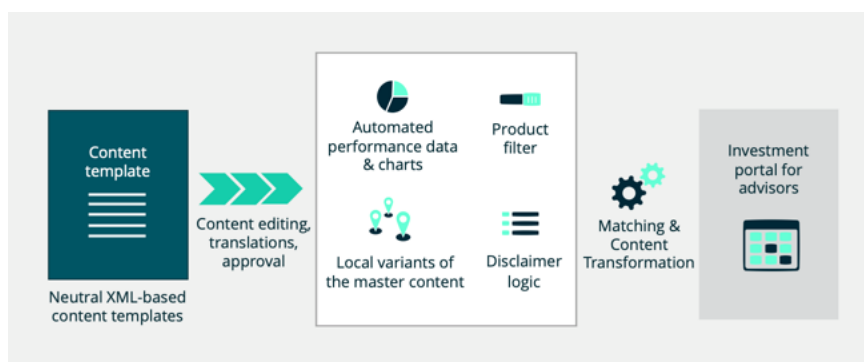
Managing this has been made possible by a central content management platform that retrieves and integrates information from various sources, automatically generates graphics and charts, incorporates regulatory logic, and consolidates content composing and translation in a single location – all with compliant, standardised workflows.

### Modern content management solutions help reduce operating costs by tackling inefficiencies in systems, workflows, and tasks. Key features include:

- Format-neutral content creation and editing via user-friendly web editors
- Standardised control and approval processes based on robust governance frameworks
- Product filters (KAG, MiFID, FIDLEG) and disclaimer/disclosure automation
- Integration with upstream systems for product, instrument and performance data
- Automated chart generation and placement in print and digital contents
- Automated translation processes with AI and/or agency integration
- Simple AI-driven content brainstorming and content categorisation within the system
- High-quality print output based on layout templates (InDesign, Canva or others)
- Automated, format-compliant distribution of content across diverse channels
- Integrated web portals for sales teams and advisors to access and customise client documents

The private bank in our example differentiates between periodic standard materials (e.g. factsheets, presentations) – content that can be planned in advance – and ad hoc materials (e.g. investment recommendations, alerts, etc). The advantage of a central, modern content management solution is that non-periodic content,

such as investment stories, alerts, and ad hoc articles can be created and managed in the same platform. For the client, well-orchestrated content creation and distribution processes across these types translate into consistent, relevant messaging – regardless of the touchpoint or the content source.



**Content delivery with an intelligent Enterprise Content Management solution.**

## MATCHING

### Next-level financial advice through artificial intelligence

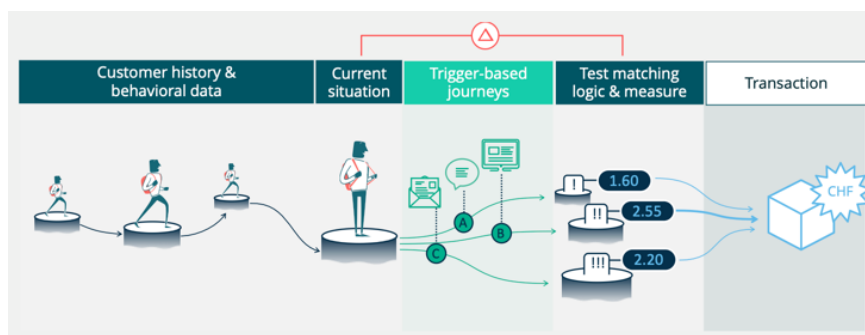
Private banking clients and investors expect personalised, time-sensitive communication from their bank regarding investment opportunities and market events.

Today, this level of personalisation can only be delivered profitably through intelligent system solutions. Yet most firms lack sufficient “matching intelligence” and therefore miss the opportunity to use AI-driven

algorithms in order to send relevant content directly to clients via their preferred channel, or to provide advisers with next-best-action recommendations that enable better client service and targeted upselling.

The enterprise content management platforms we implement for financial institutions enable AI-powered content recommendations in real time, taking into account current market conditions, client preferences, and regulatory requirements.

The result: an optimised client experience, higher conversion rates, and increased revenue.



Utilizing intelligence at all touchpoints.

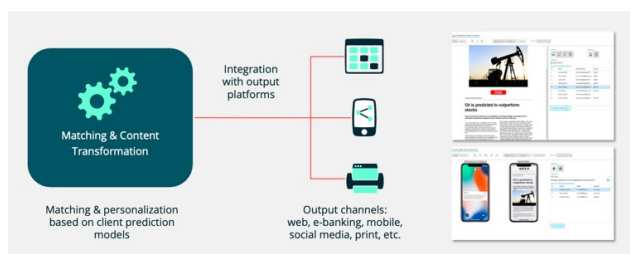
## DISTRIBUTION

### Addressing clients more personally with targeted, cross-channel distribution

Content must be accessible via every possible channel, whether this is physical outputs such as presentations and factsheets, proprietary apps with investment recommendations, e-banking platforms, web portals, or integrations with other third-party platforms.

Modern content management solutions must be capable of delivering both general and personalised information automatically across a variety of channels, including websites, e-banking portals, mobile apps, social media, print media, internal and external portals, and increasingly, AI assistants for customer advisors.

The ideal solution should simplify the transformation of content for these channel formats and make it readily available even for particularly sensitive systems such as direct client transaction platforms (e.g. e-banking) and AI advisory tools. When evaluating content management platforms, flexibility and adaptability for different content types and distribution channels should be at the very top of your requirements list.



**Automated and channel-specific distribution of customer-relevant content.**

## FEEDBACK LOOP / ANALYTICS

### Data is key: intelligent content production based on analytics

Every system collects and stores data – and content management systems are no exception. These data must be utilised, integrated with behavioural data from individual touchpoints and feedback from sales teams, and visualised for the purpose of optimising content processes. This way can we ensure that the right content is produced at the right level of personalisation.

In particular, the analytics capabilities of your content management solution should answer questions such as:

- What content do customers read (how long, how often, in what context, etc.)?
- Which materials are actually used by sales teams, and which are additionally requested?
- Which formats and content generate revenue directly or indirectly?
- What is the cost-to-revenue ratio for selected content types?
- How do clients behave in relation to different channels and topics?

## ENTERPRISE CONTENT MANAGEMENT AS A FORWARD-LOOKING STRATEGY

The topic of enterprise content management is complex and multifaceted, and the optimisation potential is often greater than initially expected.

We have supported many leading financial institutions in implementing intelligent content management platforms. Our clients are often surprised at the degree of automation now achievable in the processes outlined, and at the benefits this delivers.

Among the most valued advantages are:

- Fully automated production of factsheets and publications
- System-driven updates across all contents and sales materials
- Automated chart generation and insertion of country-specific regulatory information
- Modern translation process with automation via AI integrations
- Increased speed-to-market for investment recommendations and advice
- Building of a content repository basis for future training of AI and LLMs
- Simplified advisor access to relevant materials
- Comprehensive analysis and reporting capabilities

With these and other benefits, we enable our clients to achieve a return on investment within 18 to 24 months.

## PUT YOUR CONTENT MANAGEMENT TO THE TEST

Would you like to put your content processes and systems to the test? We are happy to support you in doing so and will realise the optimisation potential together with you step by step.

For us, the first step is to answer the following key questions. Let's address the processes and tasks with the greatest potential first:

- Which content types do we have within the organization and which of these can at least be partly standardised or have potential for further automation?
- What efficiency gains can be achieved within the existing processes?
- How long does it currently take to create or adapt publications and sales materials, for example, when updating performance and product data, making ad hoc changes due to market events, or launching new products?
- Are the existing solutions up to date and future-proof from both an infrastructure and user interface perspective?
- Are performance and product data automatically kept up to date in the system, with the latest figures always available?
- Are charts automatically generated and updated across all content types and publications?
- Are charts dynamically designed so they can be used for both print and online channels?



- Do the existing systems comply easily with KAG, MiFID, FIDLEG, and other regulations?
  - Are disclaimer rules and placement in contents and sales materials automated and in line with regulations?
  - What AI tools and logic do we want to use and integrate into our content management process?
  - Do advisors have access to a modern front-end/portal where they can easily find all relevant sales materials and share them with clients?
  - Can advisors quickly and easily compile client-relevant presentations?
  - Are content usage patterns by clients and sales teams being analysed? How can these analyses be improved to create even more targeted and relevant content and publications?
- As varied as these questions are, so too are the promising results that can be achieved with state-of-the-art enterprise content management solutions that address these challenges. Experience shows: the results justify the effort.**



Transforming Digital  
into Value

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