



Invest in your content agility.

Learn how financial services organizations connect their teams to speed content creation and ensure a reliable audit trail.



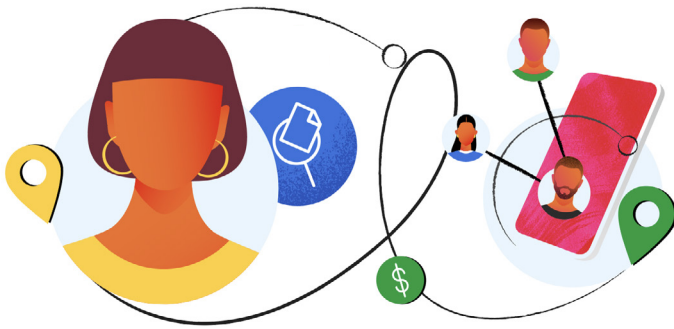
Today's customers expect cross-channel personalization and real-time responses, especially from large, traditional financial services firms. However, the traditional organizational structure doesn't lend itself to the ultra-fast pace of content creation. **Data is siloed, each team's focus is narrow, and prioritization is often unclear.**

Managers recognize that a shift is needed. According to a LeapPoint survey commissioned by Adobe, 83% of marketing, IT, and operations managers in financial services firms say improving customer journeys and digital experiences is their biggest non-sales-related marketing growth opportunity. But personalizing customer journeys while meeting the industry's stringent regulatory requirements can be complicated and time-consuming.

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In this eBook, you'll learn how a modern work management system can help financial services firms create marketing content quickly while supporting detailed legal and risk-management reviews.



Tailoring work management for financial services.

In an industry as regulated as financial services, it's critical that team communication, document storage, project management, and reporting be managed in a single location to ensure proper audit trails. However, no single system can perform all the other functions required, such as bookkeeping and graphic design, while managing communications and files.

By integrating your work management system with existing systems across your organization, you can connect and inform every department involved in content creation. This allows your creative, legal, document compliance, marketing, and other teams to continue using familiar software, which can help minimize disruptions to their current workflows.

A true end-to-end work management system will allow each of your stakeholders to work in their preferred software, easily access previous versions of assets, store and archive files with proper tracking, and deploy content onto required channels.

The graphic below shows one example of how an end-to-end integrated system could be structured.

Powering a content lifecycle orchestration solution.



Delivering creative campaigns while meeting stringent regulatory requirements.

It's no secret that navigating legal and compliance content approvals can be challenging—especially in the realm of financial organizations, where brand reputation is critical to success. Your organization's legal and compliance teams may focus on different aspects of risk, but their highest priority is safeguarding the consumer trust you've worked hard to build.

According to Inside Intelligence, consumer trust is most affected by security, followed by (in order of importance) privacy, reputation, reliability, ease of use, and breadth of services. And legal and compliance professionals are well aware that as new technologies and data sources rise, so do the associated risks.

Top areas of concern for legal and compliance teams

- Divergent regulations
- Ethical conduct
- Operational resilience
- Data protection and governance
- Compliance agility
- Geopolitical changes
- Customer trust

Source: Crowe



Marketers like you now amass data, respond, and generate content more quickly than ever before—and that speed is still increasing. One IDC study found that between 2016 and 2025, the global datasphere is expected to grow from 16 to 163 zettabytes (ZB). With artificial intelligence (AI), a financial services marketer can craft hundreds of personalized emails in a single day to inform investors of key opportunities for their portfolios. According to Accenture, they can then couple these emails with new data sources to segment and target the right customers at the right time with the right messages.

In order to create campaigns quickly and effectively while protecting customer trust, financial services organizations must:



Connect every facet of content creation, from ideation to publication, so legal and compliance reviewers can spot challenges early on



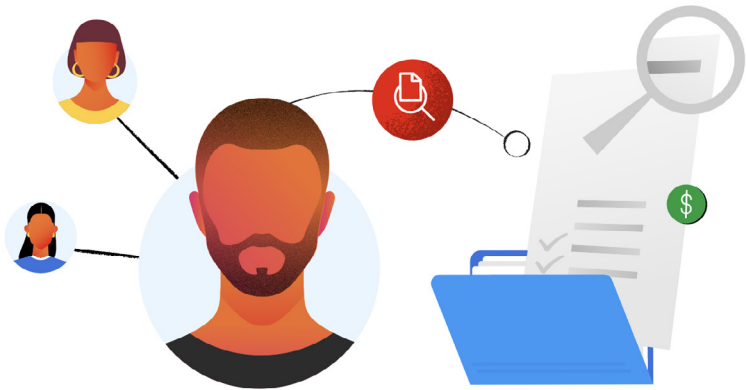
Ensure accountability and traceability for every piece of content, giving legal and compliance teams the ability to ensure that everything has been reviewed correctly

An end-to-end work management system integrates data and content management to support creative work at speed while ensuring that important details are not overlooked.

Four benefits of automating work management in financial services.

In this highly regulated industry, improving content-creation workflows offers four valuable benefits for marketing teams, project leaders, and legal or compliance reviewers:

1. Better focus on strategy and creative
2. Increased content velocity
3. Higher visibility throughout the content lifecycle
4. Easier diagnosis and optimization of performance



1

Better focus on strategy and creative.

An end-to-end work management system can relieve your creative teams of mundane tasks, ensuring they have time to innovate and adapt. Automating internal audit requirements also reduces the burden on creative teams while allowing reviewers to complete reviews more quickly.

Based on our experience with Adobe Workfront customers, organizations use collaborative work management products to model, manage, and automate repeatable tasks, including intake, triage, planning, execution, and reporting.

Fewer meetings, more productivity.

BBVA Compass is among the US's largest 25 banks, but their 10-person web team was still managing projects through emails and spreadsheets. Designers and developers spent large portions of their days in meetings. The audit process required manual email archiving for each project. With a high workload and little time left for productive work, details got overlooked and deadlines were missed.

The web team's leader deployed an end-to-end work management system that easily integrated with the bank's existing image-collaboration software. Automated tracking and reporting replaced email collaboration for each project. Now BBVA Compass's web team is far more productive—and happy. When staff arrive at work,

their workload is already prioritized and necessary information is conveniently attached to each project instead of being scattered in various emails.

[Learn more](#)

After implementing an end-to-end work management system:

20+

hours of meeting time per week reclaimed

80%

lower email volume, boosting productive time by three hours each week

50%

greater project throughput every day



The approval process is simple, and we now have an audit trail for everything we do. Approvals are no longer sitting in my email inbox, and I've eliminated busywork.

Maryland Tracy

Web Traffic Manager, BBVA Compass

2 Increased content velocity.

When content is automatically stored in a digital asset management system that's integrated with the work management system, tagging and flagging of outdated content are also automated. That helps ensure teams always work with the latest approved content.

Document reviewers can easily find the current drafts, making it easier for them to ensure—and audit—compliance with brand and regulatory requirements.

Updating work tickets.

Allianz Partners, an assistance and insurance firm, was expanding quickly, which increased the workload on its creative and compliance teams. With five brands to support, staff were being buried under work tickets—especially when the ticketing software they used was discontinued.

They deployed a modern work management system to handle creative project requests, which consolidated four separate tools

More than

**\$1
million**

in potential outside agency fees saved by using a work management system

into one solution. Other teams saw the benefits enjoyed by the creative and compliance teams and customized the same system for their departments.

By using a work management system to streamline internal processes across teams and departments, Allianz Partners estimated they saved over \$1 million in potential outside agency fees. Teams now collaborate more efficiently and save the time previously spent on emails, spreadsheets, and databases.

[Learn more](#)

“ We've gone from reacting to organizing to scaling our work.

Mary Ann Erickson, SA
Workflow Systems Engineer, Allianz Partners



3

Higher visibility throughout the content lifecycle.

Unifying the content-creation process—from intake to deployment—into a single platform creates an integrated view into campaigns and initiatives.

Reviewers can alert creative teams to potential issues with a piece of content before substantial time has been spent on a concept or image. Marketing and creative teams become more agile in the face of changing regulations or customer expectations.

Visibility plus operational performance.

Liberty Mutual stands out as a creative, approachable brand in the insurance industry. When the firm's leadership formed an in-house creative agency, they brought in a talented creative team of around 30 people—but lacked the kind of robust asset management and automated workflow system that could support the brand's famous creativity.

They chose a platform that supported creative cross-collaboration while giving executives visibility into marketing priorities and projects. By letting the work management system automate repetitive processes, the creative teams could deliver highly creative marketing pieces that were previously done by a costly external agency.

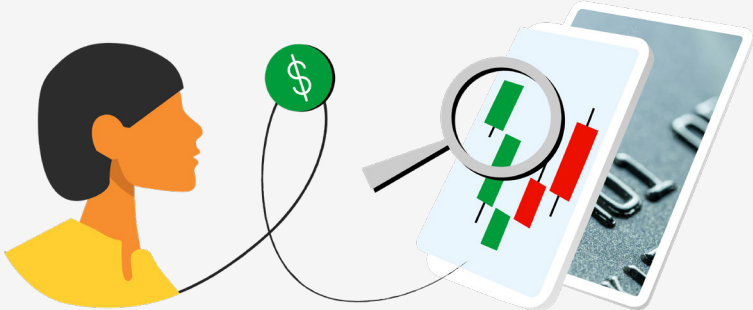
Liberty Mutual's management dashboards help leaders manage costs and plan for future needs, while the collaborative tools enable concepting, graphic design, and content creation. Staff at all levels have visibility into the schedule, including delays and bottlenecks.

[Learn more](#)

“ We have the tools to manage creative processes in a high-volume environment. We have the metrics we need to see how we're performing.

Clifford Stevens

VP, Managing Director, Creative Operations, Liberty Mutual



4 Easier diagnosis and optimization of performance.

Unifying data into an accessible central system makes it easier for project managers to turn data into insights for future operational improvements.

Project leads can track content quality, performance, productivity, content velocity, engagement, and risk while upper management gains visibility into performance.

Integrating systems can streamline workflows.

A good work management system should integrate with key systems (such as CRM, email manager, instant messaging, and asset manager) across business units so that reviews and audits don't slow



down the speed of content creation and personalization demanded in today's customer-centric world.

Deploying a united workflow solution can help your teams connect their marketing strategies to executive priorities. Personalized and automated workflows can then unite teams and departments within your company in cross-functional collaboration toward common goals.

Manage how you manage risk.

Ensuring your company manages risks while complying with existing regulatory requirements is no small task for your legal and compliance colleagues. A study by Accenture found that a first review can take from 7 to 21 days. Final approval for an innovative campaign or creative execution can take even longer.

A work management system can automate your company's adherence to document compliance rules for accountability and traceability while supporting the audit trail. The system can record details, such as who reviewed an asset and when they signed off on it. This helps ensure that the

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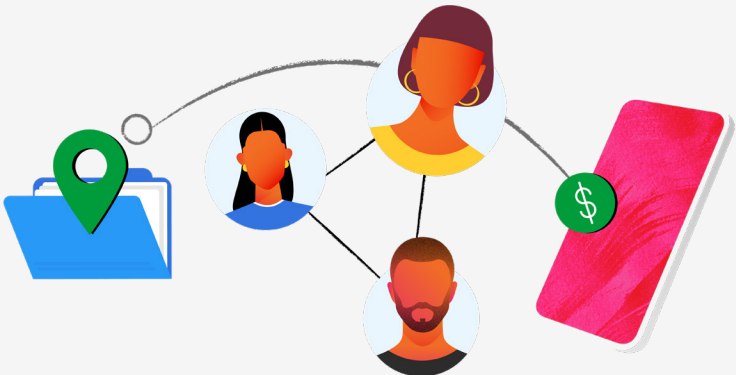
right steps are taken throughout a project and that documentation is available in case of need.

Integrating an end-to-end work management system with data management and content management tools can help align creative campaigns with regulatory compliance from the start. Reviewers have visibility into the data and insights needed to flag potential risks and compliance issues quickly—without inhibiting the content-creation workflow.

“ We eliminated a lot of the work steps that weren't necessary—steps that had just been part of the traditional workflow, yet weren't essential.

Mary Ann Erickson, SA

Workflow Systems Engineer, Allianz Partners



How Adobe can help.

Adobe Workfront allows every team on a project to work within the systems that they know best, while syncing documents, metadata, and review comments in a central place. By enabling visibility and reporting throughout the process, Adobe Workfront supports legal, compliance, creative, product, customer success, and other teams in streamlining content creation and document review management.

[Learn more about Adobe Workfront](#)

[Learn more about all Adobe solutions for financial services](#)



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