



Top Tier Bank

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VP Marketing

*Volerro Corporation
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Case Study: Top Tier Bank Delivers Compliant Materials to Client Facing Teams

The Wealth Management Group at a Top Tier Bank serves individuals and families with a minimum of \$1 million in investable assets. Their clients are typically business owners, corporate executives, professionals or others with complex needs, which may benefit from integrated wealth management advice and services.

The Challenge: Create and Distributing Timely, Compliant Content to Wealth Managers in a Single, Easy-to-Use Environment

Within the Wealth Management Group – a division of one of the largest banks in the United States – the marketing team needs to develop and deliver critical content, approved by compliance to their nationwide team of more than 1000 wealth managers.

Marketing teams in regulated industries consider compliance approval cycles as an integral part of their content production pipeline. As a result, the marketing and compliance teams need to work hand in glove to deliver impactful, compliant content without sacrificing schedules.

The Solution: Streamlined content pipeline integrated with the compliance team

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Financial markets are dynamic, outlooks change, as a result, today’s marketing content may not be appropriate next month or next quarter. Bank marketing teams needed to ensure that certain content expired on a specified date to ensure that wealth managers are armed with fresh, relevant content without sifting through a mountain of documents from prior quarters or years.

Net Result: Better Sales Collateral, Better Compliance, Happier Sales Organization

The Wealth Management Group understands that every client is unique. They needed a solution that allowed wealth managers to customize presentations while maintaining compliance. Now our wealth managers are able to build custom PowerPoint presentations from a library of pre-approved, compliant slides.

Marketing and Compliance work hand in hand reducing time to market and virtually eliminating non-compliance. Our outside agencies and freelance partners can easily gain access to our solution without compromising security. Volerro’s ease of use and intuitive design enabled our outside agencies and other partners to get started in minutes with no training – now all of our agencies are on board.