

Financial Industry

Dynamic investment funds. Digital transformation

 <p>Need</p>	<p>To foster the transformation of the digital relationship with its customers by sending out interactive reports on investment, life insurance and pension funds.</p>
 <p>Solution</p>	<p>Implementation of our Communicalia platform as a tool for the automated composition from source files (XBRL, XML, etc.), dynamic generation and optimal presentation of interactive reports (quarterly, semi/annual and annual), distributed through multiple channels for different formats and devices.</p>



Need

Our client, a leading player in the banking sector with international reach, needs a tool to support its strategy on transforming the digital relationship with its customers. The platform must respond to a growing need to provide, within its forms of communication regulated by the CNMV (Spanish Securities Exchange Commission) and those permitted, formats and attractive content to streamline customer retention, cross-selling and upselling activities with a reduced investment of internal resources.

The system must also facilitate the process for investors to select digital channels. Another of the customer's requirements was to have a suite of cutting-edge tools which would differentiate the company from its competitors.

Solution

Implementation of Communicalia as a platform for the composition, creation and multichannel dispatch of dynamic reports on investment funds.

In addition to the traditional report stipulated by the CNMV or relevant regulating institution, dynamic reports allow the investor to interact with the information at any time without the need for direct Internet connection, on multiple devices and in a responsive manner. Investors will always have, if required, their report on paper and in digital format (secure PDF in repository)

The solution also offers an attractive, user-friendly and flexible design, with active features in both online and offline situations. What is more, it incorporates marketing enhancements: click analytics, promotion of associated products, personalised offers, customer retention videos, surveys and customer support via live chat.

Implementation time: Three months.

Results

- 43% saving on internal reporting resources.
- 20% reduction in postal costs because users sign up to the electronic report.
- 1.2m physical dispatches per year + 200,000 online messages via email and on-screen graphics.