

Top 5 Financial Services Firm Leverages Naehas to Transform Disclosure Management Process

Solution delivers greater efficiencies, improved accuracy, while reducing errors, approvals and cycle times

Overview

Marketing technology leaders in the complex, heavily-regulated financial services industry are facing increasing challenges. Staying ahead of the competition requires staying current on proven solutions which address low efficiency, high cycle times, scalability, compliance risk, errors in disclosures and inconsistent channels. Naehas worked with a leading wealth management giant to drive measurable, meaningful results.

Challenge

Guide the client in leveraging technology to improve a disclosure management process that was extremely inefficient, costly, and error-prone. Initial outcomes indicate that the Naehas Disclosure Management platform meets objectives by realizing workflow efficiencies, providing supporting tools, storage and cycle times. Early findings show solid outcomes.

Success Criteria



Streamline the process
and eliminate redundancies



Reduce numerous rounds
of creative and legal approvals



Improve accuracy
and compliance results

Solution

How the platform is positioned to answer the need:

- Develop a global disclosure content directory and organize data into content sets
- Develop a business logic of keeping Schumer versions as global “matrix” with embedded rules
- Re-engineer creatives to assign the appropriate disclosure version to each package

Initial Testing Results

Significant operational outcomes are expected, based on preliminary findings:

- Instead of updating hundreds of versions independently, updates are made to source versions and published globally in under an hour
- Eliminated outside ad agencies and creative and legal review reduced to final sign off

“Everything was implemented in three months and worked like magic.”

- **Nicole W.**, Top 5 Finserv client, on initial outcomes

About Naehas

Naehas provides a customer experience cloud purpose built for financial services companies to help create and accurately deliver truly personalized products, pricing and experiences to their customers. With compliance and auditability built-in, Naehas streamlines content creation, marketing reviews and disclosure management so that you can look outward to growth and innovation while managing risk. By seamlessly integrating with existing martech and backend systems, Naehas brings a modern, centralized platform for managing, accelerating, and fulfilling customer experiences.

Leading organizations, including 4 of the 5 top financial services companies rely on Naehas to help them accelerate time to market, increase response and conversion rates, reduce costs and eliminate compliance errors.

Learn how your company can improve their disclosure management process with Naehas's unique, automated solutions by contacting sales@naehas.com or visit www.naehas.com.