



The Benefits of Modern Enablement: A Guide for Financial Services Firms

In the last few years, the use of digital tools and channels has accelerated throughout the financial services industry. Short-form videos, virtual meetings, hybrid work, social media marketing, and personalized email communications have become table stakes for every advisor, agent, banker, relationship manager, wholesaler, and client service executive. What's more, these client-facing professionals have to demonstrate a broader array of knowledge because their expertise is critical to their value proposition.

Addressing these requirements with productivity, efficiency, and compliance in mind is a challenge for many banks, wealth and asset management firms, insurance companies, and FinTechs.

That's where a modern enablement platform comes in. From streamlining findability in content libraries, to personalizing and sharing content via email and social media, to streamlining workflows and collaboration, to capturing and analyzing data on everything from content consumption to training results, today's enablement platform is emerging as a core capability for every leading firm. That's because the technology aligns with industry-wide goals to improve operational efficiency and effectiveness and to better meet clients' digital expectations through actionable intelligence.

This guide is designed to provide an in-depth primer on how modern enablement platform capabilities can be leveraged to address the most pressing requirements of any financial services institution.



Sales Content Management

Improve operational efficiency and effectiveness



Build, maintain, and control content in a scalable platform that makes it easy to organize, find, and share differentiated assets.

- Find content easily
- Manage content effectively
- Govern content lifecycle

USE CASE 1

Increase impact of product launches

USE CASE 2

Increase impact and value of campaign launches

USE CASE 3

Organize assets for specific clients and/or opportunities

USE CASE 4

Streamline content approval and expiration date processes, including distribution partner approvals

BENEFITS

- ↑ Advisor-Agent-Banker-RM-Wholesaler-Service productivity
- ↑ Client satisfaction
- ↑ Time to market for quality deliverables
- ↑ Content impact
- ↑ Employee satisfaction

GOAL

Free up time to focus more on clients



Learning and Coaching

Improve operational efficiency and effectiveness

USE CASE 1

Onboard new
hires faster

USE CASE 2

Increase skill set
and knowledge of
client-facing
teams

USE CASE 3

Uplevel service
experience

USE CASE 4

Leverage
best-practice
insights to
improve team
performance

BENEFITS

- ↑ Employee engagement and retention
- ↑ Employee satisfaction
- ↓ Number of feedback channels
- ↓ Ramp time
- ↓ Time to create content
- ↑ Increase NPS scores
- ↓ Call resolution times



Actionable and intuitive solutions for learning, coaching, and skills development for customer-facing teams

- Shorten ramp times
- Provide continuous learning
- Coach winning teams

GOAL

Improve the impact of client-facing staff



Strategy and Planning

Improve operational efficiency and effectiveness



Define and implement programs and content strategies. Plan, execute, measure, and iterate in one coordinated, streamlined workflow.

- Sophisticated prioritization
- Resource planning
- Execution workflows

USE CASE 1

Define and implement programs and content strategies. Plan, execute, measure, and iterate in one coordinated, streamlined workflow

USE CASE 2

Plan enablement and learning programs in support of product launches and other announcements

USE CASE 3

Prioritize Sales requests of Marketing, Product, Service, and Learning & Training teams

USE CASE 4

Plan onboarding programs for new hires

BENEFITS

- ↓ Manual work and processes
- ↑ Impact of project planning
- ↓ Complexity associated with content audits
- ↑ Alignment on priorities

GOAL

Increase productivity and collaboration across teams



Content Automation

Improve operational efficiency and effectiveness

USE CASE 1

Automate pitchbooks, fact sheets, and commentaries

USE CASE 2

Automate and streamline client reviews and other client deliverables

USE CASE 3

Automate and streamline RFP processes

USE CASE 4

Automate and streamline onboarding processes

BENEFITS

- ↑ Client engagement
- ↑ Team capacity
- ↑ Content value and quality
- ↓ Content sprawl
- ↓ Spend/effort allocated to current content repositories



Deliver personalized experiences efficiently and at scale through quick assembly, reusable components, and dynamic templates, or streamline the mass production of materials, even those that require data integrations.

- Produce content faster
- Keep content compliant

GOAL

Drive more impact from content



Client Engagement

Modernize to align with buyers' digital expectations



Allow teams to create memorable experiences and interact effectively across all touchpoints and channels to deepen relationships and move deals forward.

- Leverage digital channels
- Create memorable experiences

USE CASE 1

Deepen client engagement and increase impact of cross-sell initiatives

USE CASE 2

Acquire new clients

USE CASE 3

Improve impact of Advisor-Agent-Banker-RM recruiting

USE CASE 4

Help foster compliant deal management

BENEFITS

- ↑ Revenue
- ↑ Market perception
- ↑ Buyer engagement
- ↓ Cost per sale
- ↑ Tech adoption
- ↑ Value of client relationships

GOAL

Deliver memorable client experiences that increase loyalty



Enablement Intelligence

Grow smarter through actionable intelligence



Equip leaders to improve performance with insights into the behaviors, activities, and content that deliver the best outcomes. Combine human-centered and automated analytics to help increase productivity and repeat success.

- Improve team performance
- Optimize content strategy
- Unite data sources

USE CASE 1

Refine and improve training and onboarding programs

USE CASE 2

Replicate best practices and develop accompanying learning programs

USE CASE 3

Assess impact of content and refine content strategy

USE CASE 4

Unify data sources to streamline various workflows


BENEFITS

- ↑ Advisor-Agent-Banker-RM-Wholesaler-Service productivity
- ↑ Retention of top-tier talent
- ↑ Increase impact of marketing
- ↓ Time to complete requests, approvals and other business processes

GOAL

Deliver memorable client experiences that increase loyalty



Platform	Grow smarter through actionable intelligence				
	USE CASE 1	USE CASE 2	USE CASE 3	USE CASE 4	BENEFITS
 <p>Integrations with CRMs, data providers, content repositories, BI tools, marketing automation tools, and much more.</p>	Increase adoption of CRM through integration	Better align sales and marketing communications and campaigns	Drive more value from data investments	Increase efficiency through integrations with popular tools (e.g., Google, Microsoft Outlook, Slack)	↑ Revenue ↑ Market perception ↑ Buyer engagement ↓ Cost per sale ↑ Tech adoption ↑ Value of client relationships ↑ Employee satisfaction

GOAL

Unify and drive more value from your tech investments



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