

# Oracle Marketing Cloud for Asset Management

*"We've gone from using manual processes on a variety of antiquated systems to supporting customers with targeted, consistent, and relevant information across a variety of channels."*

*Cameron Malcolm  
Director of eMarketing  
AGF*

Oracle Marketing Cloud for Asset Management enables mutual fund wholesalers, institutional asset managers, and marketers to strengthen relationships and meet compliance requirements while lowering overall marketing costs.

## KEY CHALLENGES FOR ASSET MANAGEMENT

Financial advisors and institutional clients expect asset management firms to not only manage and distribute investment products to them but also to be more like trusted partners providing relevant, summarized, and timely research data and tools. The roles and expectations in the asset management industry continue to evolve:

- Wholesalers want to expand their business by establishing relations beyond their core set of advisor accounts while satisfying their industry's numerous and growing compliance requirements.
- Institutional sales departments need to expand their business by marketing directly to both the plan sponsor and consultant communities while simultaneously satisfying compliance and security regulations.
- Marketers worry about efficiently and effectively managing a wide range of marketing campaigns—from e-mail and print to events and websites—while delivering metrics on those campaigns.

## SOLUTION CAPABILITIES

Asset management firms require a solution that enables a multi-touch, one-on-one connection with their clients. In this way, they can differentiate themselves while establishing the most important element for success in their industry: trust. Oracle Marketing Cloud for Asset Management enables firms to meet client needs with the following capabilities:

- **Client segmentation.** Align client interests with the product information they require and track their responses to specific campaigns.
- **Advisor relationship campaigns.** Leverage best practice templates and dynamic content to send highly personalized communications. The preconfigured templates included are: Meet Your Wholesaler, Advisor Newsletter, Advisor Ramp Up Education Series, Advisor Book of Business Series, Trends and Market Updates, and Events and Conference Registration.
- **Secure microsites and landing pages.** Use advisor data and online behavior to build personalized and dynamic microsites or landing pages for an exceptional online experience.
- **Campaign creation management.** Provide sales representatives with the ability to send targeted, trackable campaigns to their advisors—from either an iPad or the Web—with preapproved content and templates.

- **Analytics and dashboards.** Track how marketing efforts are driving client and sales engagement and ultimately share of wallet with the Insight feature of Oracle Marketing Cloud for Asset Management. Produce high-level dashboards or drill into specific details by campaign.

### MEET COMPLIANCE GOALS

The asset management industry operates under a variety of regulatory and financial compliance mandates. Oracle Marketing Cloud for Asset Management supports compliance with these requirements by providing a unique set of internet protocols branded with company domains and an automatic blind carbon copy (BCC) feature generating an audit trail that tracks who did what, and when.

### DEEPEN AND EXPAND ADVISOR TRUST VIA EFFECTIVE COMMUNICATIONS

Wholesalers gain the trust of advisors when they are efficient in their communications with them—delivering the right information at the appropriate time. Oracle Marketing Cloud for Asset Management assigns rankings based on advisors' profiles and online behaviors to create customer segments. By incorporating this data into long-term nurturing campaigns that use personalized e-mails and microsites, wholesalers remain top-of-mind beyond their core set of advisor accounts.

### ENHANCE RELATIONSHIPS WITH INSTITUTIONAL CLIENTS

To achieve success, institutional sales representatives must be top-of-mind with plan sponsors and consultants. Oracle Marketing Cloud for Asset Management supports strategic communication programs that deliver information that plan sponsors and consultants need in order to make informed choices. Institutional sales reps can market directly to decision-makers and enhance relationships with fund managers and their consultants.

### REDUCE THE COST OF MARKETING PROGRAMS WITH EFFECTIVE TOOLS

Managing marketing campaigns can be complex, time-consuming, and expensive. Oracle Marketing Cloud for Asset Management makes it easy, with intuitive templates—such as Meet Your Wholesaler and Trend and

Market Updates—and workflows that automate segmentation and communications. Manual tasks are eliminated in managing small- or large-scale campaigns, and a personalized, multi-touch approach across print, e-mail, website, and telemarketing channels is possible.

### VISIBILITY INTO AND MEASUREMENT OF MARKETING EFFORTS

Aligning marketing efforts with results can be difficult. Oracle makes it easy with the Insight feature, a comprehensive marketing reporting and analytics component of Oracle Marketing Cloud for Asset Management. Insight puts powerful reporting and website analytics at a marketer's fingertips, providing valuable information and easy-to-understand dashboards that help marketers quickly assess the impact of marketing efforts.

### HIGHLIGHTS FOR THE ASSET MANAGEMENT INDUSTRY

- **Financial grade compliance and security.** You get auto-archiving of all outbound messages for auditing purposes, controlled user access to the application, dedicated IP, single sign-on, and secure websites.
- **Best practice blueprints.** Choose from a variety of ready-made templates such as Meet Your Wholesaler, Advisor Newsletter, and Trends and Market Updates to ramp up your marketing programs quickly.
- **Segmentation.** A unified marketing database enables out-of-the-box integration with leading CRM systems such as Oracle Sales Cloud, salesforce.com, Microsoft Dynamics CRM, and Oracle's Siebel CRM on Demand. You can bring custom data from other internal sources such as unit holder systems, assets under management, and portfolio information.
- **Oracle Marketing AppCloud.** With more than 100 apps, Oracle Marketing AppCloud enables you to evaluate and integrate marketing, sales, and social media applications into Oracle Marketing Cloud.

### CUSTOMER SUCCESS IS OUR KEY DIFFERENTIATOR

- **SmartStart Implementation Service.** Oracle's innovative methodology accelerates the success of your implementation. In three days, Oracle gets you started by ensuring that Oracle Marketing Cloud is synced with your CRM database, forms and tracking

are on, and your segmentation and prioritization are up and running.

- **Oracle account team.** Customers benefit from support, success, and expert teams knowledgeable in marketing best practices and in implementing Oracle Marketing Cloud.
- **Professional services and certified partners.** Oracle and its partners offer a range of professional services to support your implementation and day-to-day management of Oracle Marketing Cloud.
- **Ongoing certification through education.** Oracle offers classes to expand your understanding of marketing best practices as well as Oracle-specific product knowledge.
- **Topliners community.** Join the growing community of thousands of Modern Marketers using the Oracle Marketing Cloud. Connect and share through a vibrant online community and local events.

### KEY FEATURES

- Client segmentation

- Advisor relationship campaigns
- Secure microsites and landing pages
- Ability to customize and track e-mails based on templates
- Analytics and dashboards
- Out-of-the-box integrations with CRM systems and hundreds of apps

### KEY BENEFITS

- Integrate out-of-the-box with leading CRM systems and bring custom data from other internal sources.
- Leverage best practice templates and dynamic content to send highly personalized communications.
- Use advisor data and online behavior to build personalized and dynamic microsites and landing pages.
- Send targeted, trackable campaigns to advisors with preapproved content and templates.
- Track how marketing efforts drive client and sales engagement and share of wallet.

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Learn more about Oracle Marketing Cloud at: [oracle.com/marketingcloud](https://oracle.com/marketingcloud)

### About Oracle Marketing Cloud

Modern Marketers choose Oracle Marketing Cloud to build customer obsessed cultures, create and manage ideal customers, and power revenue performance. They use award-winning technology and expertise to transform marketing by truly knowing the customer, engaging with cross-channel marketing, and achieving data driven accountability. Integrated information from cross-channel, content, and social marketing with data management and activation along with hundreds of app and data partners enables them to target, engage, convert, analyze, and use award-winning marketing technology and expertise to deliver personalized customer experiences at every interaction. Visit [oracle.com/marketingcloud](https://oracle.com/marketingcloud).