

Oracle Marketing Cloud for Wealth Management

“More than three out of every five advisors do not believe their firm’s technology platform is sufficiently integrated.”

*2012 Advisor Productivity
Survey
CEB TowerGroup Research*

Oracle Marketing Cloud for Wealth Management helps marketing professionals systematically differentiate a firm’s brand to advisors and clients, recruit additional advisor capacity, and enable advisors to achieve success by supporting a personalized and targeted communications strategy with relevant content between advisors and their clients.

KEY CHALLENGES FOR WEALTH MANAGEMENT

Marketers in wealth management must balance multiple priorities of increasing clients, attracting top advisors, and controlling costs. Conventional marketing methods centered on direct mail, batch-and-blast e-mails, and spreadsheet tracking are a thing of the past.

Wealth management marketers must address new challenges and choices:

- Power shifting to advisors who are establishing independent firms.
- Erosion of the client base as assets move to assisted and direct models.
- Brand enhancement that establishes the firm as a brand of choice to recruit advisors.

Modern Marketers in wealth management are personalizing messages, gaining market share by providing superior brand content, and satisfying regulatory requirements. For competitive advantage, wealth management marketers must replace past methods and begin the journey to Modern Marketing where technology and expertise deliver the power they need to succeed.

SUPPORT WEALTH MANAGEMENT ADVISORS WITH DIGITAL BODY LANGUAGE

Oracle Marketing Cloud for Wealth Management provides wealth management marketers with a means to harness the Digital Body Language of advisors and clients for enhanced segmentation and context specific personalization of all marketing communications. In addition to online behaviors, wealth management marketers can also leverage social, profile, and website data to send automated communications or place dynamic ads for immediate engagement when target audiences are most receptive.

ATTRACT AND RECRUIT WEALTH MANAGEMENT ADVISORS

Oracle Marketing Cloud for Wealth Management can help marketers achieve success in attracting and recruiting advisors by leveraging best-in-class marketing automation and content management technology to create and send highly personalized communications.

ADDRESS REGULATORY AND COMPLIANCE REQUIREMENTS

Oracle Marketing Cloud for Wealth Management offers capabilities that enable administrators to configure the system to save a copy of every e-mail sent through the software to a destination of your choice, facilitating adherence to compliance requirements.

MODERN MARKETING SOLUTIONS FOR WEALTH MANAGEMENT

Oracle Marketing Cloud for Wealth Management helps mitigate key marketing challenges while enhancing brand in the eyes of advisors and clients. Modern Marketers in wealth management take advantage of the following capabilities:

- **Targeting.** Employ sophisticated Co-Dynamic Lead Scoring and Digital Body Language technologies to capture digital behavior and segment for relevancy.
- **Engagement.** Launch brand communication or event-triggered nurture campaigns with one- to-one personalization based on history, life events, and profile information.
- **Conversion.** Deploy approved, proven, and branded templates for specific scenarios while empowering advisors, integrating with CRM systems, and personalizing client relationships.
- **Analysis.** Analyze and report the performance of campaigns and display revenue results for executive management on easy-to-understand dashboards.
- **Campaigns.** Leverage best practice templates and dynamic content to send highly personalized and relevant communications. Preconfigured programs include: Advisor Recruitment Campaign, Digital Event Campaign, Live Event Campaign, Education Campaign, Client and Advisor Newsletter Campaign, and Welcome and Know Your Customer Campaign.

Oracle Marketing Cloud for Wealth Management offers tools and solutions:

- **Secure Hypersites and Landing Pages.** Use data from e-mail responses, social networks, and online behavior to build personalized and dynamic microsites or landing pages to help build exceptional experiences.
- **Oracle Marketing Cloud Engage.** Give your marketing, channel, and sales teams the ability to send targeted, trackable, and measurable campaigns from an iPad or web browser with preapproved content and templates. Increase agility while improving visibility.
- **Insights Oracle Marketing Cloud.** Track how marketing efforts are driving engagement and ultimately wallet share. Produce high-level dashboards and drill into specific details by campaign.

GAIN MARKETING VISIBILITY AND MEASUREMENT

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

HIGHLIGHTS FOR THE WEALTH MANAGEMENT INDUSTRY

- **Financial compliance.** The offering includes 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 New Advisor Recruitment, Digital Events, Live Events, AdFocus and Demand Gen, Dynamic Content Newsletter, and Welcome and Know Your Client campaigns 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's Siebel CRM On Demand, salesforce.com, and Microsoft Dynamics CRM. You can also bring custom data from other internal sources.
- **Oracle Marketing AppCloud.** With more than 100 apps and growing, Oracle Eloqua AppCloud enables you to evaluate and integrate marketing, sales, and social media applications into Oracle Eloqua Marketing Cloud Service.

CUSTOMER SUCCESS IS OUR KEY DIFFERENTIATOR

- **Oracle Marketing Cloud SmartStart Implementation Service.** Oracle's innovative methodology accelerates the success of your implementation. In three days, Oracle Marketing Cloud SmartStart Implementation Service 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 the 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.** Oracle offers a wide variety of 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 Oracle Marketing Cloud. Connect and share through a vibrant online community and local events.

KEY FEATURES

- Targeting and segmentation
- Demand generation and nurturing e-mail campaigns
- Secure microsites and landing pages
- Ability to customize and track e-mails based on best

practices

- Analytics and dashboards
- Out-of-the-box integrations with leading CRM systems

KEY BENEFITS

- Connect cross-channel, content, and social marketing with data management and activation.
- Integrate with leading CRM systems, content marketing, social, and other data sources.
- Integrate and coordinate marketing and thought leadership activities with advisors.
- Leverage best practices and dynamic content to send highly personalized communications.
- Use interaction data and online behavior to build personalized and dynamic microsites and landing pages.
- Place targeted display ads and deploy measurable campaigns with consistent content and messaging.
- Track how marketing efforts drive revenue and engagement.

Learn more about Oracle Marketing Cloud at: 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.