

Are you DDO ready?

How IntelligenceBank helps financial services brands with Design and Distribution Obligations

With the new product marketing compliance obligations, financial services brands are now required to have a robust product governance framework to ensure the correct 'target markets' are included across their marketing content. Here's how IntelligenceBank can help:

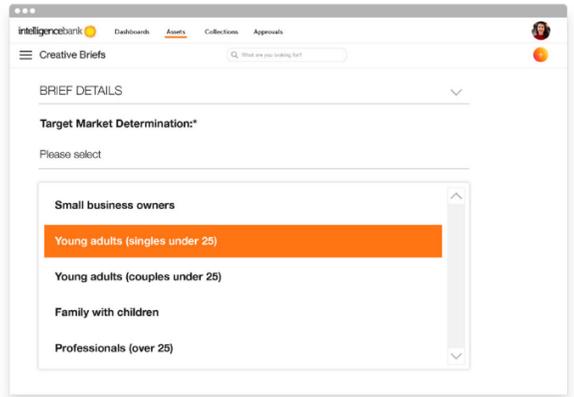
1. Lower the cost of compliance
2. Ensure there is an audit trail for all product collateral changes
3. Easily provide regulators or internal audit teams with instant reporting
4. Store all approved DDO marketing content
5. Tag all DDO content and search approved assets by target market, review dates and product lines

With our Marketing Operations Platform, here's how it works.

1 Capture "Target Market Determinations" during the briefing process

Behind every piece of great content is a comprehensive creative brief that meets DDO requirements and has been signed off by the necessary stakeholders.

IntelligenceBank's online briefs can feature smart forms which can automatically include target markets by product and assign approvers by product line.

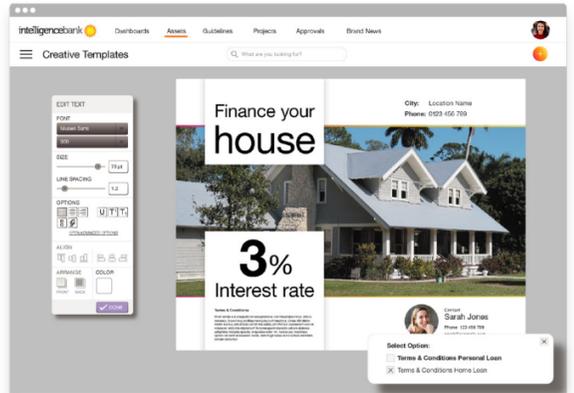


2 Automate DDO-compliant product content at scale

With Dynamic Creative Templates, local teams such as brokers, external partners and internal staff can instantly tailor product content.

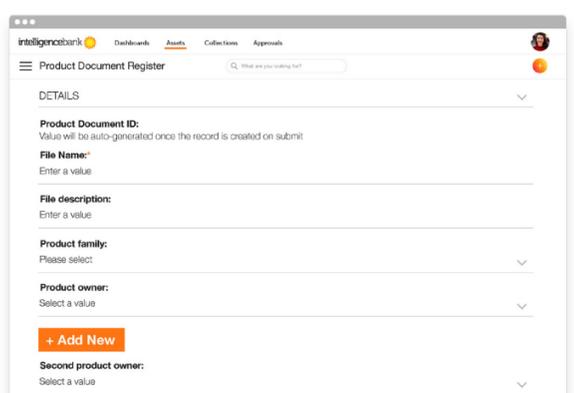
Not only does it ensure all content is on-brand but it automatically includes target market determinations and disclaimers based on products selected.

It can also include custom information such as names and local branches or contact information.



3 Keep a register of all product related content

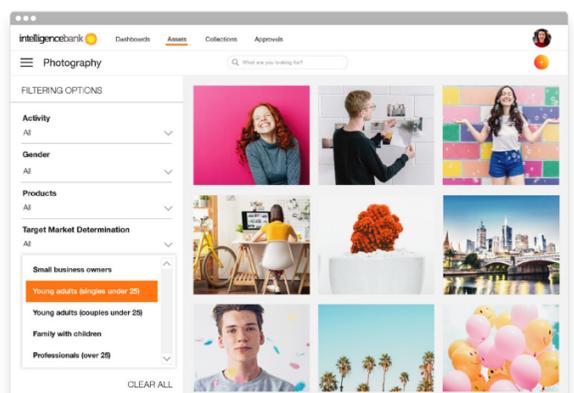
If you are trying to keep track of thousands of PDS documents as well as product advertising, you can keep a register of each item with review date alerts and owners with links to the final approved creative.



4 Store all approved product content in one place to easily find, share and manage

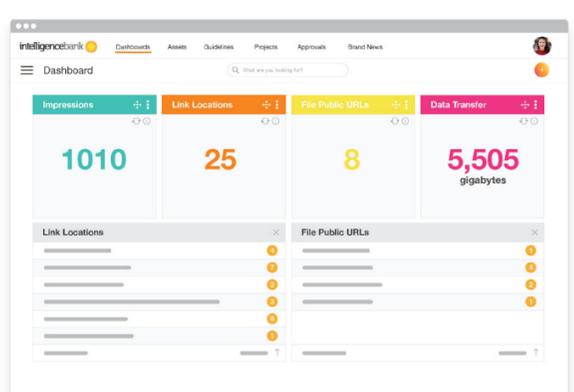
IntelligenceBank DAM can be tailored to have custom metadata fields to capture product lines, target market determinations and also content owners and review dates.

So when you need to find, share or review product content, it's all just a click away.



5 Track and report on all product related content

With IntelligenceBank's dashboards, usage reporting and custom reports give your team instant access on how, when and where product content is being used.



We help leading financial services clients manage efficiency and brand compliance



IntelligenceBank is the leading Digital Asset Management, Online Brand Portal and Marketing Operations Platform, helping financial services marketers work faster and stay DDO compliant.

For more information, contact us at ask@intelligencebank.com