



## CrownPeak for Financial Services

| A Pocket Guide for Financial Services |

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## Introduction

**First and foremost, thank you for your interest in CrownPeak for Financial Services Organizations. This white paper is meant as a “field guide” on how for centralize and increase the effectiveness of your online marketing operations.**

You’ve got a great brand – but how do you ensure that it stays intact as you diversify across multiple marketing channels, and product and service lines?

These days, responding quickly to the ever-increasing challenges in online marketing is not a “nice-to-have” – it’s a core requirement. Integrating all of your Web operations into an integrated marketing engine for acquisition, retention and cross-sell/up-sell can give you a tremendous set of capabilities. These things include:

- ▶ Managing the content easily and efficiently on your Web site
- ▶ Improving search engine marketing and search engine optimization results
- ▶ Reaching your target audience with user generated content and other innovative tactics
- ▶ New developments in Web advertising, including contextual and localized ad placement
- ▶ Creating and sending email campaigns – then converting and managing the leads all the way through the sales cycle

Content is at the core of all these activities and the ability to easily create, edit, manage and maintain that content is how CrownPeak is helping financial institutions quickly and easily respond to this “change”. We provide a flexible solution for updating changes to your Web site(s) and managing your online communication efforts in a much more effective way.

## Who Is CrownPeak?

CrownPeak is the first and only company to provide world-class Web content management and site search as a software service. Now in our seventh year in business, more than 300 Web sites are managed by CrownPeak software. In the financial services area, we are proud to serve customers such as Trust Company of the West (TCW), Safe Credit Union, Old National Bank, Dearborn Financial and Coburn Ventures.

CrownPeak has been named to eContent’s 100 most influential companies list, has won eWeek’s prestigious Analysts Choice Award, is on ASP.com’s list of Top 25 ASP’s Worldwide, and has been a SIIA Codie Award finalist as Best Content Management Solution and Best Software as a Solution. InfoWorld also named CrownPeak CMS Technology of the Year as Best Content Management Solution, and IDC has named CrownPeak as “the only enterprise-level content management solution delivered as a SaaS.”



## The CrownPeak Platform

Because CrownPeak's solution is a software service, there is no hardware or software to install, no servers to manage – and no lengthy implementation or installation processes. We help financial services organizations manage the public facing Web sites, and digital marketing campaigns that are becoming a large part of their marketing mix.

While our solution is not right for the transaction based part of financial services, CrownPeak is an excellent solution to manage the marketing and communication focused pieces of Web site operations.

## Overview of Marketing The Financial Services Organization Online

It's certainly no secret that social networking is a hot topic. But we know as digital marketers, this social networking trend is part of a larger movement to develop relationships with our customers. In today's over-saturated market, it's about listening to what our customers are saying, and developing relationships with them before they've become customers.

Take a simple example: sales leads coming from the Web site. Normally, every good financial services marketer has a system to enable leads from the Web site to automatically update their CRM system (like Salesforce.com) and apply the campaign name or the lead source from which they came. And, if we're really clever, we even have the ability to create new campaigns from our content management system before we publish the landing page. Then, we A/B test it, to determine which version gets the highest CTR, and we clap our hands together and say "aren't we fabulous." That is great for the status quo, but if that's all we are doing we're missing the larger opportunity. The metrics measured from the landing page are content. The different offers are content. The data that we're not collecting from our Web site is – you guessed it – content. And, it can be qualitative.

### LEADS AREN'T NUMBERS. THEY ARE YOUR NEW FRIENDS

Again, let's consider a new lead coming from a form on your Web site. It may surprise you to know that if this lead automatically updates your CRM system then you're well ahead of most financial services organizations. Yes, it's true, most mid-sized financial services companies haven't automated basic sales/marketing processes between their business applications. If you're one that hasn't, it's an important next step.

But, what if it could do more. What if you provided for some fields (or even one) on your lead generation form that allowed for leads to add additional, open-ended content; for example, "How did you hear about us?" or, "What can we do for you?" This can be much more effective than a drop-down menu or a checkbox. Of course, you won't be able to assign numerical values to this content because by its very nature it's open-ended. But you can get some extraordinarily interesting and valuable results from your customers, and of course share this information with sales because it is being passed into your CRM system automatically.

Or, take this a step further. What if the content coming in from the Web site (the leads), could be combined with the content that generated that lead (the offer on the landing page.) Then combined with the click-path the lead took to get to that offer so you have a view of that pages viewed, time spent on the site or other content downloaded. In addition, then combined with the SEM ad creative that the lead clicked on to get to landing page. What if you could manage that within your content management system and publish a centralized report that listed this information by product, by campaign, etc. What if all that information was available from the content management system and the CMS also published it to your CRM system as well? And then imagine that if you changed any one element, that it would change in all the various media as well.

Now, I realize that I'm suggesting a fairly granular set of capabilities here – this content may or may not have use for your particular marketing initiatives. I'm using leads here to keep the example simple. Let your imagination run wild; for example, this could be customers extolling their own uses for a particular product, or FAQ's being answered and re-published to a specific customer help-site, or customer-oriented blog.

The key here is getting beyond the numbers, and into the quality (and quantity, quite frankly) of content that can be generated by your customers, and actually allowing them to tell you what they think – and managing this content like you would any other content. In other words, using your content management system as an aggregation tool to bring in analytics data, and campaign content all in one centralized place.

## 7 Tips To Centralize Your Web Management Strategy

So, how does this get put into place? Consider these Web site management strategies:

1. Consider adding the ability to accept open-ended content from your Web site users. Ask questions that allow them to communicate with you, this is, of course, the era of Web 2.0. I'm not suggesting a psychological examination – this is something you can (dare I say) A/B test to determine the right quantity.
2. Consider a CMS that has Web 2.0 capabilities. As I said earlier, functionality like blogs, social networks, RSS feeds, etc. are becoming site functionality expectations from customers and prospects, allowing for bidirectional communication on your site. You need to be able to quickly and easily pull the content from these places and publish back out based on that information.
3. Consider content management solutions that allow this content to be pushed or pulled seamlessly into the CMS. In this way, the content can either be edited and republished (in the case of a customer suggested FAQ knowledgebase), or parsed and reported (for a lead generation form).
4. Consider adding the ability for customers to rate content and add comments to content – in order to let the users determine the value (or lack thereof) of the content.
5. Consider content management solutions that allow for these ratings, or analytics data to effect the workflow and placement of content. For example, you should have the ability to automatically raise the visibility (feature it on the home page) of a valuable piece of content.

6. Consider a CMS that will allow you to easily create, edit and retire landing pages. This becomes invaluable to online marketers when managing multiple campaigns across a variety of product/service offerings.
7. Consider hosted content management solutions that allow for seamless integration with other applications, as well as publishing of content out to multiple destinations – so that content pulled into the CMS can be aggregated, moved through workflow and then approved to update salesforce.com or similar.

Using technology to simply monitor a customer relationship is like trying to determine your customer's intent by watching a security camera in your store. Why not use technology to not only talk to your customers, but also listen, collaborate and ultimately communicate?

## Anatomy of a Financial Services Company – A Case Study

**“Before CrownPeak, we had a problem publishing content quickly and allowing more authors access to manage it. Once we selected CrownPeak, we experienced a dramatic change in our publishing processes.”**

Director of Web Services

Large Mortgage Lending Company

Since 1995, this financial services company has delivered on its promise to make finding mortgage services easy and accessible. The company is a real estate investment trust (REIT) and one of the nation's premier full-service mortgage finance companies, providing first and second mortgage products to borrowers nationwide through their operating subsidiaries.

### THE CHALLENGE

In order to improve its competitive position, the company realized it needed to create a faster, more efficient way to publish Web pages, increase the number of authors publishing and control their brand. Faced with the real challenge of keeping costs down while implementing a new system, the company's goal was to find a comprehensive solution that would provide overall back-end support and optimization of their Web site by using a powerful content management system.



“We needed a company to provide us with a dynamic content management solution at the right price,” said the Director of Web Services. “We weren't interested in reinventing the content management wheel by building our own publishing system. We took our time and found the right company to help us achieve our specific objectives.”

Director of Web Services

Large Mortgage Lending Company

## CROWNPEAK CMS SOLUTIONS

The company chose CrownPeak CMS, a comprehensive content management system to simplify its Web site operations—Internet and Intranet—and to significantly lower its IT costs, while improving its publishing speed and content integrity. Before introducing CrownPeak CMS, it took the company 5 days, 51.1 hours, and 7 associates to work on publishing. After implementing the CrownPeak system, the company is able to save a projected \$1 Million dollars per year, publish in real-time without delay and reassign 6 of the 7 associates.

## CASHING IN ON THE CROWNPEAK CMS

CrownPeak CMS makes the company's Web site the center of its enterprise management operations. CrownPeak's workflow and publishing features help maintain site integrity, while allowing for dynamic collaboration among content contributors who need consistent internal communication. "Before CrownPeak, we had a problem publishing content quickly and allowing more authors access to manage it. Once we selected CrownPeak, we experienced a dramatic change in our publishing processes," remarked the Director of Web Services. "CrownPeak's CMS has solved a lot of functionality problems for us while improving our overall content performance."

## Conclusion

Choosing the right Web content management solution will truly strengthen your business, and help to centralize your online marketing operations. It will put an end to the constant "leakage" from fixing issues as well as concerns from under-supported applications. It will give you the flexibility to expand and modify the solution for your customers quickly and easily. And it will keep you in constant touch with your customers, so you are better able to communicate and keep that customer for many years.

Choosing the right Web content management solution will truly strengthen your business. It will not only create efficiency for the Web site management process, but (depending on your business) provide you with a number of opportunities to create competitive advantages, revenue opportunities and new avenues for customers and partners to communicate with you through your Web site.

You're an expert in your business – and you shouldn't have to become an expert in Web content management in order to be successful. We would suggest working with a content management vendor who will become a core part of your Web site management team as a content management expert. But then again, as you might expect – we're biased that way.

We wish you the best of luck with your CMS implementation – and we hope this pocket guide is of help to you.

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**CrownPeak**<sup>™</sup>  
MANAGE CONTENT NOT TECHNOLOGY