

Case Study: Bringing Digital Transformation to Financial Services

Canadian Digital Adoption Program (CDAP) Grant Recipient

OVERVIEW

Successful organizations everywhere are embracing Digital Adoption because they understand it is the single most important opportunity that enables them to use technologies across all aspects of their business.

Company Details

This client provides strategic wealth management to individuals, families, and business owners.

Operating since 2007



SECTOR

Financial Investment Activities



HOME BASE

Edmonton, AB



CHALLENGES

When it comes to understanding the importance of embracing change in order to garner long term results, our financial services client is no rookie. In order to bring a modernized approach to an industry that is heavily regulated and traditionally slow to adopt technological solutions, we needed to identify aligned ways to help improve online presence and internal operating processes.

SOLUTIONS

For this client, we identified 3 key areas of opportunity in which digital adoption strategies will have immediate impact on their operational enhancements and growth potential.



Enhanced Digital Marketing



Digital Automation Tools



Digital Documentation & Centralization

BENEFITS

1

Building brand awareness through digital marketing -

Leverage a total online presence model where all tactics are working together to move prospects from awareness phase through to loyalty & referral phase.

2

Enhanced use of digital automation tools -

Leverage existing tools, provide cross-training, and adopt additional capabilities to improve digital delegation and automation processes.

3

Improve operating organization through digital documentation -

Adopt cloud-based technologies to transition out of date operating practices into a more streamlined online approach.