

Marketing Platform

Empower Your Marketing, Content and Brand

A marketing platform that empowers financial brands to compliantly create, approve and publish content. We've redefined what workflows and approval processes look like, so your brand can become remarkable.



KEY FEATURES OF THE MARKETING PLATFORM

- Social Media Management:** Directly manage, monitor and engage across social channels.
- Mobile Access:** Create, edit and approve content while you're away from your computer.
- Unlimited Users:** Add unlimited users on each brand at no additional cost.

CREATE

Collaborate: Draft, review and approve marketing content in one location.

Content Calendar: Plan and schedule traditional and social content in the same view.

Mobile App: Upload and moderate content from iPhone and Android apps.

Content Library: Access to social media content for your financial brand in our turnkey content library.

Preapproved Responses: Respond quickly with ready-to-go messages.

MANAGE

Monitoring: Monitor, manage and respond to web and social mentions.

Custom Roles: Manage access restrictions and workflow.

Moderation: Manage posts, account access and responses.

Complaint Management: Flag and escalate concerning comments and reviews.

Archival: Automatically archive all social post, engagement and traditional marketing.

REPORT

Marketing Binder: Digitally sort and archive all marketing campaigns and materials.

Reporting: Get on-demand marketing binder and social media activity reporting.

Audit: Generate audit reports for internal and external compliance exams.



Keeping it Compliant

Our marketing platform allows compliance and marketing teams to easily collaborate with:

- Secure role-based access
- Content approval workflows
- Preapproved content and controls
- Compliance driven archival and reporting
- Auditor access functionality