

RBC Wealth Management

Case Study



**Wealth
Management**

Royal Bank of Canada Wealth Management offers a full suite of banking, investment, asset management, trust, insurance, credit/lending and other wealth management solutions. RBC Wealth Management is one of the world's top 5 wealth managers with \$944 billion in assets under management.

The Challenge:

RBC Wealth Management wanted to implement a new digital strategy and vision. One of the key tenets of the strategy was to change and improve the digital engagement between advisors, clients and prospects. Additionally, they wanted to improve recruitment through digital engagement. Their current software platform would not meet the needs of their strategy so they had to go to market and find a way to move off the old platform.

RBC Wealth Management requirements:

- Support financial advisors in growing their online presence
- Offer a flexible website solution that provides different templates
- Collaborative partner for continuous improvement and visibility of product roadmap
- Reduce the level of technical support

The Solution:

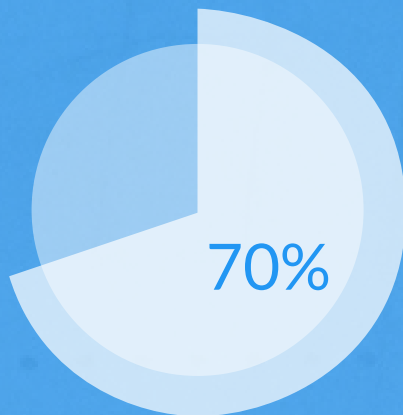
RBC partnered with Veriday because of our forward-thinking approach and software platform. Digital Agent was chosen to provide the enterprise with a content marketing platform that could take them to the next level of digital engagement.

Key deliverables of this project:

- 3000+ complex, branches and advisor practices with mobile-responsive websites
- 6 unique multilingual templates within a cohesive digital brand
- Multi-stage approval process tailored to enterprise business rules
- Real time advisor search delivered through corporate website
- Marketing Library with pre-approved corporate content

The Results:

Veriday accelerated RBC's digital transformation by migrating 3000+ websites in under 8 months delivering high advisor satisfaction ratings across North America. Since implementation, RBC experiences high active usage with over 6000 content submissions per month and a growing population of bloggers.



Form submissions were lead based

Key Results

44%

Increase in Mobile Traffic

200%

Increase in Lead Form Submissions on Mobile Devices

50%

Of all Inbound Traffic Driven by Organic Search

70%

Form Submissions were Lead Based

“As an organization, we wanted to elevate how our advisors interacted with customers. The strong collaborative team that we have built with Veriday means that we will be able to continue to expand our reach because Digital Agent is always moving forward with us.”

What's Next?

- Launch of integrated email marketing platform software
- Deliver future product roadmap aligned to RBC digital strategy priorities
- Provide advanced SEO and SEM services to advisors