QP **Quark** Publishing Platform™

Client:	Multinational Financial Services Provider
Industry:	Banking & Finance
Use Case:	Product and Fund Documentation for Clients
Users:	200+
Country:	Global
Goal:	Digital Transformation, Regulatory Compliance

QP **Quark** Publishing Platform™

QD **Quark** Docurated™

Multinational Financial Services Company Accelerates Time to Market with Compliant Content Automation from One Intelligent Platform

This well-known US-headquartered financial services company is a multinational provider of banking, investment and related services, helping retail and institutional clients with their financial goals from across its global operating subsidiaries.

The Importance of Compliant Content

This multinational financial services corporation produces hundreds of different documents for a wide range of regional audiences and stakeholders, from product lists to fund factsheets, and iterates thousands of versions of those documents across multiple business departments.

Its document authoring and publishing approach led to a complex situation. Some teams relied heavily on Microsoft Office tools to produce key enterprise content, while others used document-specific point solutions. And the same was true for document storage and sharing, with many different content repositories used.

With regulatory compliance a top concern, they needed a solution that could ensure only approved and compliant documents were shared with stakeholders, and at the same time help automate the steps involved in authoring and publishing said documents to remove error-prone human intervention wherever possible.

It was important that any new solution would fit the way the business wants to work as a single content automation platform, rather than the business needing to change its ways of working due to a combination of point solutions, and that it be intuitive for the team to adopt.

Why Quark?

Quark Publishing Platform (QPP) with **Quark Docurated** enables their six authors and numerous contributors to have a structured, componentized authoring workflow that allows them to focus on writing and reusing content in a collaborative way, assembling new compliance-controlled documents quickly. Approved documents get published directly in the required formats into Docurated where they can be easily found and securely shared with customers.

Specifically for Product List documents, **Quark Publishing Platform** uses pre-defined templates and automatically pulls in the required data to generate the new client-facing documents. For example, QPP fetches the data automatically in real-time to assemble a new product list document, which brings a high degree of automation, accuracy, and efficiency into the document creation workflow. Previously, it took 15 days to update the thousands of documents they were producing. Now it takes just 7.

The company needs people to trust the content they see, and with **Quark Docurated** they have one central repository for a diverse set of documents, where up-to-date and compliance-approved content is automatically available, searchable and shareable.

Today, 200 users across the business rely on Docurated to share key documents with their clients to give them a better customer experience. Integrated with other document management systems, it provides a taxonomy-driven structure to organize vital documents for easy consumption. The team also benefits from Docurated's content intelligence engine, making it easy for them to track document engagement, consumption and overall content performance.

The new workflow based on Quark's end-to-end platform allows them to create around 100 new documents per day. Previously, when manually changing or copying and pasting content, the risk of human error was high, and new

Advantages / Results

- Improved customer experience, as all compliance-approved documents are easily accessible, searchable and shareable from one central repository.

- Faster time-to-market of new content, producing up to 100 documents per day, where previously they could only produce five documents per day.

- Faster versioning of content, with thousands of documents able to be updated as required within one week, where previously it would take 15 days.

- One easy-to-use platform that reduces manual work, automating content workflows for multiple document types, regardless of how or where they are created.

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Quark™

If a quark – in science – is the basis for all matter, then Quark – the company – is the basis for all content. The company revolutionized desktop publishing and today provides content design, automation and intelligence software for end-to-end content lifecycle management. Customers worldwide rely on Quark to modernize their content ecosystems so they can create complex print and digital layouts, automate omnichannel publishing of mission-critical documents, and analyze production and engagement insights for the greatest return on their content investments.