QP **Quark** Publishing Platform® NEXTGEN

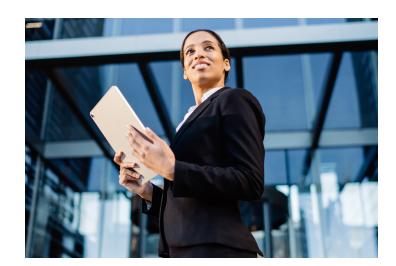|	
Client:	Multinational Financial Services Provider
Industry:	Financial Services
Use Case:	Research reports, Fund marketing
Users:	200+
Country:	USA
Goal:	Digital Transformation, Regulatory Compliance

Financial Services Organization Adopts Structured Authoring to Speed up the Creation and Omnichannel Publishing of Complex Research Reports

The investment banking division of this bank provides large corporate, government and institutional clients with a full spectrum of solutions to their strategic advisory, financing and risk management needs.

The Challenge

Within this organization, credit research analysts sought a robust platform to streamline the authoring and publishing of extensive research reports exceeding 30 pages. These reports feature a blend of textual analysis, alongside numerous tables and charts, resulting in intricate documents.

Given the rapid changes in the financial market, these **research reports** require frequent updates to reflect the latest market conditions, regulatory changes, and economic trends. Managing dynamic content and ensuring timely updates presented additional challenges for report authors and publishers.

Furthermore, the content required web-based accessibility and omnichannel output capabilities for previewing and printing. However, their existing research composer solution fell short in meeting these demanding requirements.

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Why Quark?

Quark Publishing Platform (QPP), along with its Web authoring tool, empowers 200 credit research analysts and contributors to seamlessly collaborate on the creation and distribution of research reports through a structured, componentized and metadata-driven workflow.

Recognizing the collaborative nature of report creation, this bank sought a user-friendly tool that would facilitate easy user adoption and possess the robustness to support real-time co-authoring. Key capabilities such as version control, change tracking and role-based access were essential, enabling numerous contributors to work on a document simultaneously.

What sets QPP apart from other content collaboration platforms is its closed-loop content lifecycle management engine. Within this engine, the entire content operations process – from creation, management, collaboration & review, assembly, omnichannel publishing to content analysis – is housed within a singular CCMS platform.

A platform which effortlessly integrates with the organization's existing content ecosystem, streamlining laborious and business-critical processes. This integration not only enhances operational efficiency but also facilitates the seamless import of data from external sources and formatting into components such as Foresight, ERA, and Market Data.

By automating data imports, the bank has significantly reduced the likelihood of errors that can occur during manual data entry or formatting. This ensures that the data used in research reports, including multimedia elements such as charts, graphs, and tables, is accurate and reliable, thereby enhancing the accuracy and credibility of the bank's insights and analysis.

The Results

- The collaborative authoring approach provides enhanced versioning control and tracks the contributed sections through a transparent audit trail.

- Omnichannel publishing offers the ability to create content once and automatically preview and publish to numerous channels and formats.

- Data importing from external services such as Foresight, ERA, and Market Data is seamless with automated formatting into components.

Quark Publishing Platform with its Web authoring tool provides the credit research analysts with a structured, componentized, metadata-driven authoring workflow. The platform seamlessly integrates with their existing content ecosystem to speed up the creation and omnichannel publishing of long, complex, highly regulated research reports.