

Case study

Driving Financial Services Customer Success with a Cloud-based, *Smart* Metadata Hub

Whether you operate in capital markets, banking or the insurance industry, you need solid information to make decisions that drive positive organization, stakeholder, and customer outcomes. As the volume of data flowing into financial organizations continues to explode, the ability to rapidly access, manage, and make sense of it is key to managing risk and improving ROI.

Regardless of sector, financial services organizations are looking for innovative solutions that allow them to:

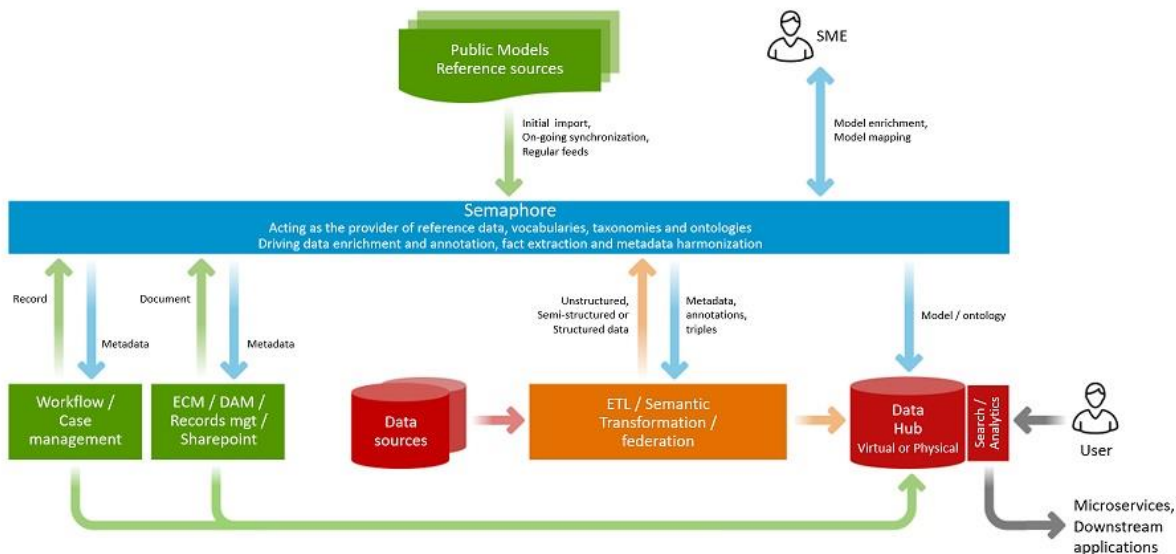
- Unify and harmonize a variety of data types from disparate sources to provide a single view of the organization.
- Provide relevant information to a broad range of internal and external stakeholders in real-time for analysis, reporting, and management.
- Ensure compliance with regulatory mandates to decrease risk and avoid sanctions.

The key to managing enterprise data is harmonization, the ability to provide a holistic view of all information, structured and unstructured, regardless of location and type that can be used to manage the business and provide a robust customer experience, is key in today's ever changing environment.

The Opportunity

One financial institution that provides personal and commercial banking, wealth management, and financial market services to their clients, leveraged Semaphore Cloud's SaaS platform to solve their information challenges.

Semaphore Cloud provides a flexible solution and supports their ability to geographically segregate enterprise data, which allows the organization to meet search and compliance requirements. The environment is cost effective as it eliminates expenses associated with hardware acquisition, provisioning, and maintenance. And it reduces the maintenance hassles of software installation and support of applications on company computers or in data centers.



As part of their initiative to migrate the company intranet to Office 365/SP Online, they identified a need to evaluate the efficacy of manual content classification. Internal users performed manual tagging of information assets yet the results were not consistent. When documents spanned multiple pages, they were broken into smaller documents, which increased the corpus for manual tagging and user workload. The result – an increase in tagging errors.

To be successful, they needed a semantic platform that would support auto-classification in multiple languages – French and English - enhance and enrich collaboration and knowledge management environments, as well as provide augmented model harmonization, management, and governance capabilities.

How Semaphore Helped

They began by using Semaphore Knowledge Model Management (KMM) to create a multi-language (French & English) enterprise model to support a broad range of use cases and reflects the policy documents, procedures, and end user content throughout the organization. They worked with multiple stakeholders i.e. Human Resources, IT, Project Management, and subject matter experts, to enrich the model with synonyms and alternative labels that reflect the content to improve model quality. The model was further enhanced with additional vocabularies and relationships between vocabularies were identified.

The model was published and combined with AI, natural language processing, and machine learning strategies to perform bulk classification of site collections as well as on-going, auto-classification of content stored in SharePoint Online. This robust classification strategy incorporates organization data, conversations happening throughout the enterprise, and end-user content stored in Microsoft repositories.

Semaphore's ability to quickly auto-classify content and apply precise, complete and consistent metadata, results in transparent and accurate results. Semaphore's Classification Review (CRT) and Classification Analysis Tools (CAT) document and analyze classification variations and address current classification challenges. The ability to classify in automated as well as assisted mode, allows users to overwrite tags based on a comparative list, which greatly increases user productivity.

The Result

Today, information is easy to find and the user search experience provides trusted and relevant results. The organization is using a multi-language, smart metadata hub, which harmonizes disparate information across the enterprise to drive knowledge management and improve findability and data governance.

To learn how Semaphore can help you increase efficiency and reduce costs associated with content classification, enhance and enrich collaboration and knowledge management, as well as provide augmented taxonomy harmonization, management and governance capabilities, contact us at info@smartlogic.com

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