

bibb!io.

 Wealth
Management.com

Specialist insights for the wealth
management community

CASE STUDY



About Wealth Management

The company



Launched in 2011, Wealth Management is a digital resource for financial advisors and estate planning professionals, part of the Business Intelligence Division of Informa.

Their marketing services and multi-media channels are used by several hundred wealth management firms daily to promote and communicate product, brand, and career opportunities to their audience.

Their challenge

Though already familiar with out-of-the-box related posts solutions, Wealth Management were looking for a more tailored experience.

They were on the hunt for:

- A smart solution to promote sponsored content and maximise revenue
- A third-party technology provider that could be seamlessly incorporated into their current design
- The ability to track the widget's performance
- Dynamic recommendations that evolve with their audience

Implementation

The API

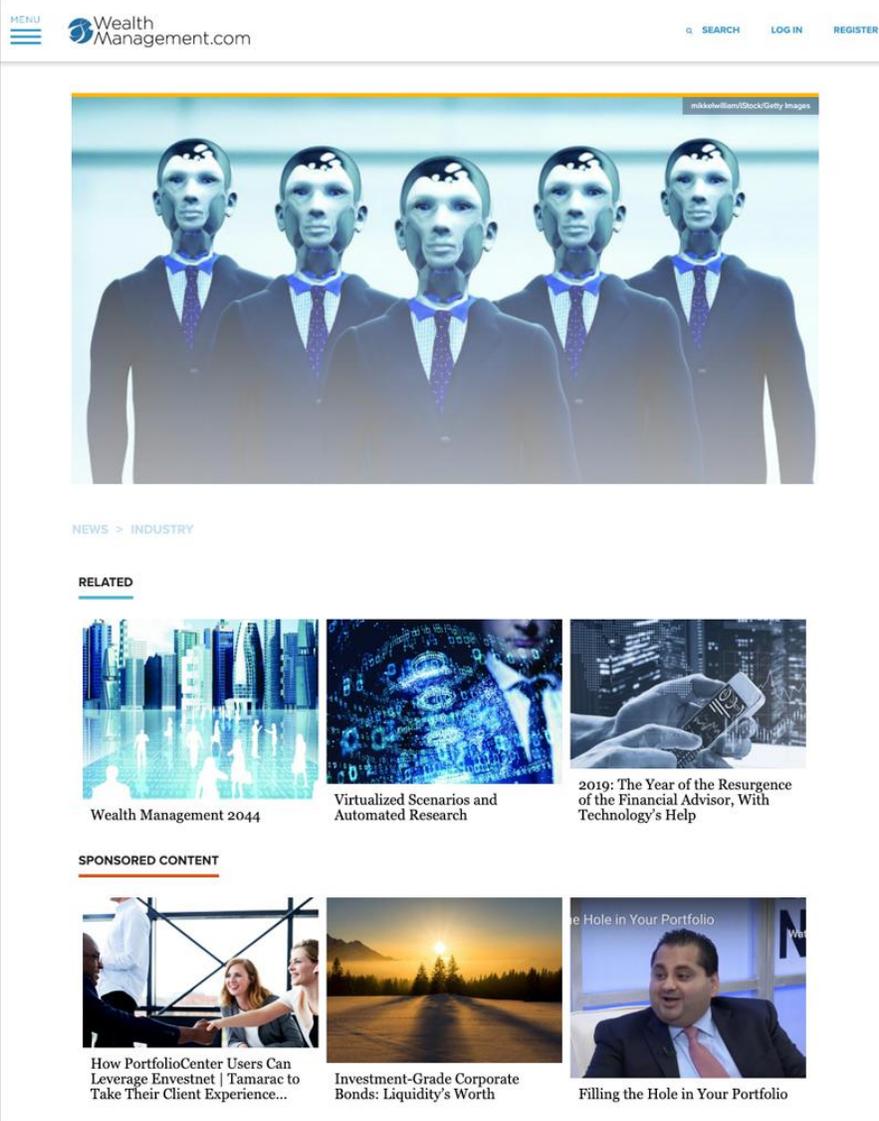
All our technology is available via API for a more flexible and autonomous installation. Full support and interactive documentation is supplied in order to assist the technical team during onboarding.

CMS Integration

Biblio's recommendations were incorporated to the site's template on Drupal and can easily be switched on/off across other sites in the future, for a faster integration at scale..

Optimized recommendations

User engagement was maximized by choosing a blend of contextual similarity and popularity. A recency boost was applied to keep the recommendations aligned with industry news.



The screenshot displays the Wealth Management website interface. At the top, there is a navigation bar with a 'MENU' icon, the 'Wealth Management.com' logo, and links for 'SEARCH', 'LOG IN', and 'REGISTER'. The main content area features a large image of five identical male avatars in suits, each with a glowing brain icon, representing virtualized scenarios. Below this image is a 'NEWS > INDUSTRY' breadcrumb. A 'RELATED' section follows, containing three article thumbnails: 'Wealth Management 2044' (cityscape), 'Virtualized Scenarios and Automated Research' (digital face), and '2019: The Year of the Resurgence of the Financial Advisor, With Technology's Help' (hand holding a smartphone). Below the related articles is a 'SPONSORED CONTENT' section with three more thumbnails: 'How PortfolioCenter Users Can Leverage Envestnet | Tamarac to Take Their Client Experience...', 'Investment-Grade Corporate Bonds: Liquidity's Worth' (sunset road), and 'Filling the Hole in Your Portfolio' (man speaking).

User experience

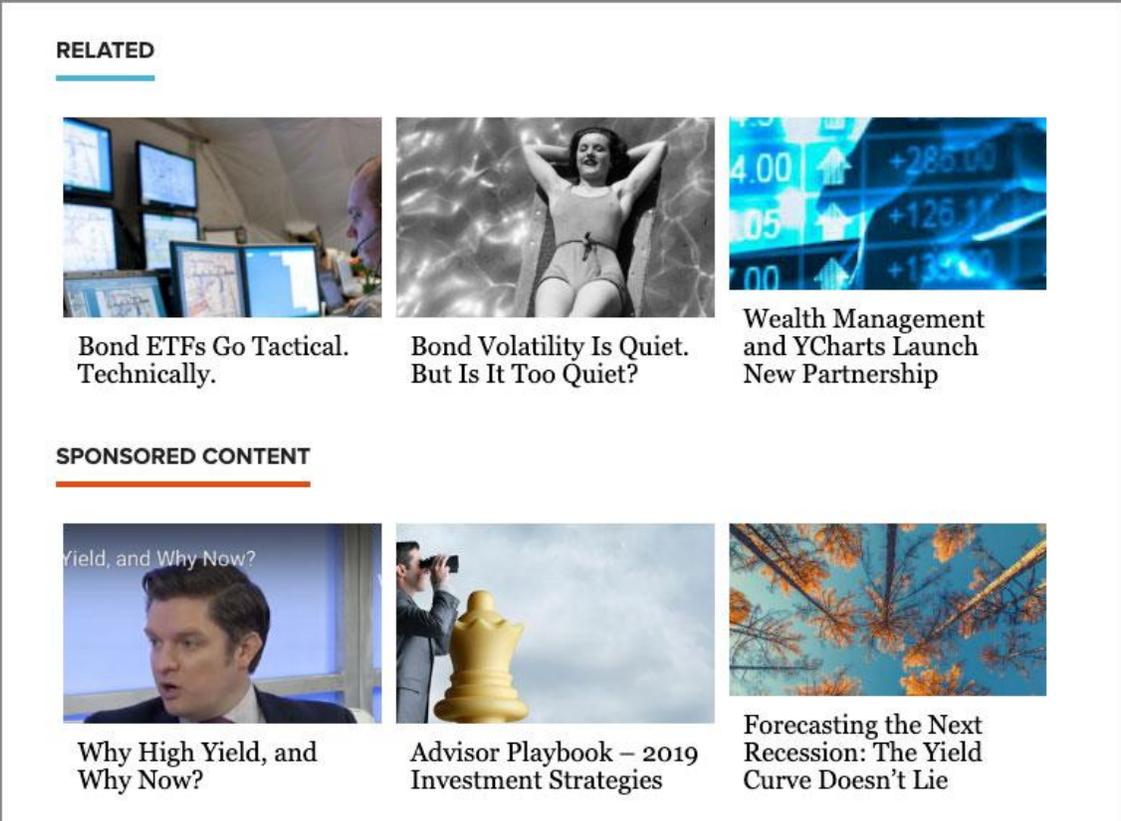
Different widgets, same tech

Using Biblio's catalogue function, WM were able to separate their sponsored content from their editorial content. Each module displays related suggestions generated specifically for the article in order to maximize engagement.

Total transparency

Instead of pushing unwanted content onto the user, Biblio's optimized algorithm learns from interaction data to deliver the most relevant sponsored articles to the readers.

RELATED



Bond ETFs Go Tactical. Technically.

Bond Volatility Is Quiet. But Is It Too Quiet?

Wealth Management and YCharts Launch New Partnership

SPONSORED CONTENT

Why High Yield, and Why Now?

Advisor Playbook – 2019 Investment Strategies

Forecasting the Next Recession: The Yield Curve Doesn't Lie

Outcome

The results

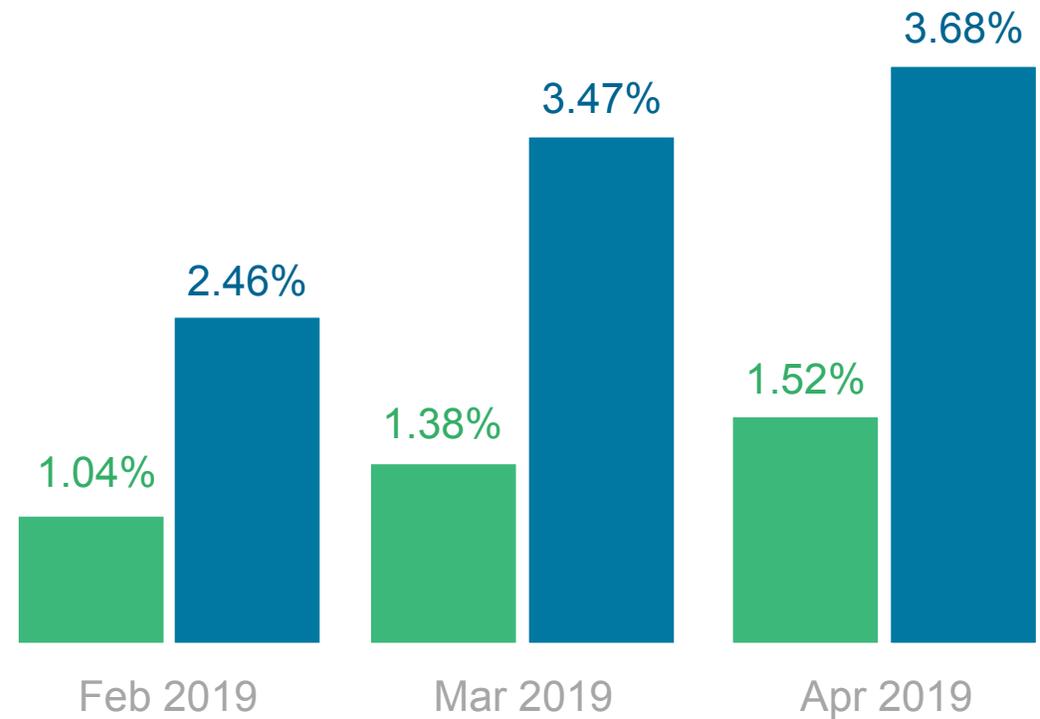
Biblio's signature algorithm adapted to user interaction in order to improve the recommendations and maximize month-on-month uplift.

CTR

The ratio of users who click on a recommendation served on a page, compared to the number of page views.

In-view CTR

The ratio of users who click on a recommendation served on a page, compared to the number of times users saw the Biblio module.



The ROI for Wealth Management

Growth via Biblio 18k page views/month

Resulting revenue \$4,800 /month
Cost of Biblio -\$ 329 /month

Net uplift to Wealth \$4,471

ROI 14.58x

The screenshot shows the Wealth Management.com website interface. At the top, there is a navigation bar with 'MENU', 'Wealth Management.com', 'SEARCH', 'LOG IN', and 'REGISTER'. The main content area is divided into several sections:

- RECENT:** A list of recent articles, including "Are You an Average Financial Advisor?" (APR 16, 2019), "Fixed-Income Outlook Q1 2019" (APR 01, 2019), "Building Your Business From Taxes To Transitions" (APR 13, 2019), "Is it time to be a Contrarian? Navigating Fed Policy and Geopolitical Risk with Commodities" (APR 12, 2019), "LPL Adds RightCapital's Planning Software to Its Vendor Program" (APR 12, 2019), and "When Grief Comes to the Office" (APR 12, 2019).
- DAILY MEMO:** A prominent orange banner offering daily stories and relevant reports, with a "SUBSCRIBE" button.
- FEATURED:** A section highlighting "The 10 Best States for Clients to Retire in 2019" (JAN 18, 2019), "Top Money Managers Warn of 2019 Risks" (DEC 31, 2018), "Inside ETFs' Hidden Gems of 2019" (JAN 17, 2019), and "How Smart Are You About the SEC's Regulation Best Interest?" (JAN 11, 2019).
- REGULATION & COMPLIANCE:** A tag for the featured article "RBC Wealth Management is deeply committed to careful management of the wealth clients entrust to us. We are disappointed in the arbitrator's decision and disagree with the claims brought forth in this case, she said. It is important to note that the client's accounts were profitable and that economic and market conditions caused the market value of some of Ms. Khaleel's securities to decline."
- RELATED:** A section with three related articles: "Morgan Stanley Fight Exposes How Firms Smear Exiting Brokers", "Congressional Panel Debates Mandatory Arbitration", and "Estate's Heirs Liable for Unpaid Federal Estate Taxes".
- SPONSORED CONTENT:** A section with three sponsored articles: "Sector Views - Bank Loans: Secondary Loans Shrug Off Large Deals", "From the Desk of the Global CIO: Late-Cycle Drama Is Unfolding", and "Investment-Grade Corporate Bonds: Liquidity's Worth".
- Sign-up Form:** A dark blue banner at the bottom with the text "Sign up for the Morning Memo newsletter." and a form with fields for "Email address", "United States" (dropdown), and a "SIGN UP" button.