CIBC Private Wealth

SharePoint Marketing Website

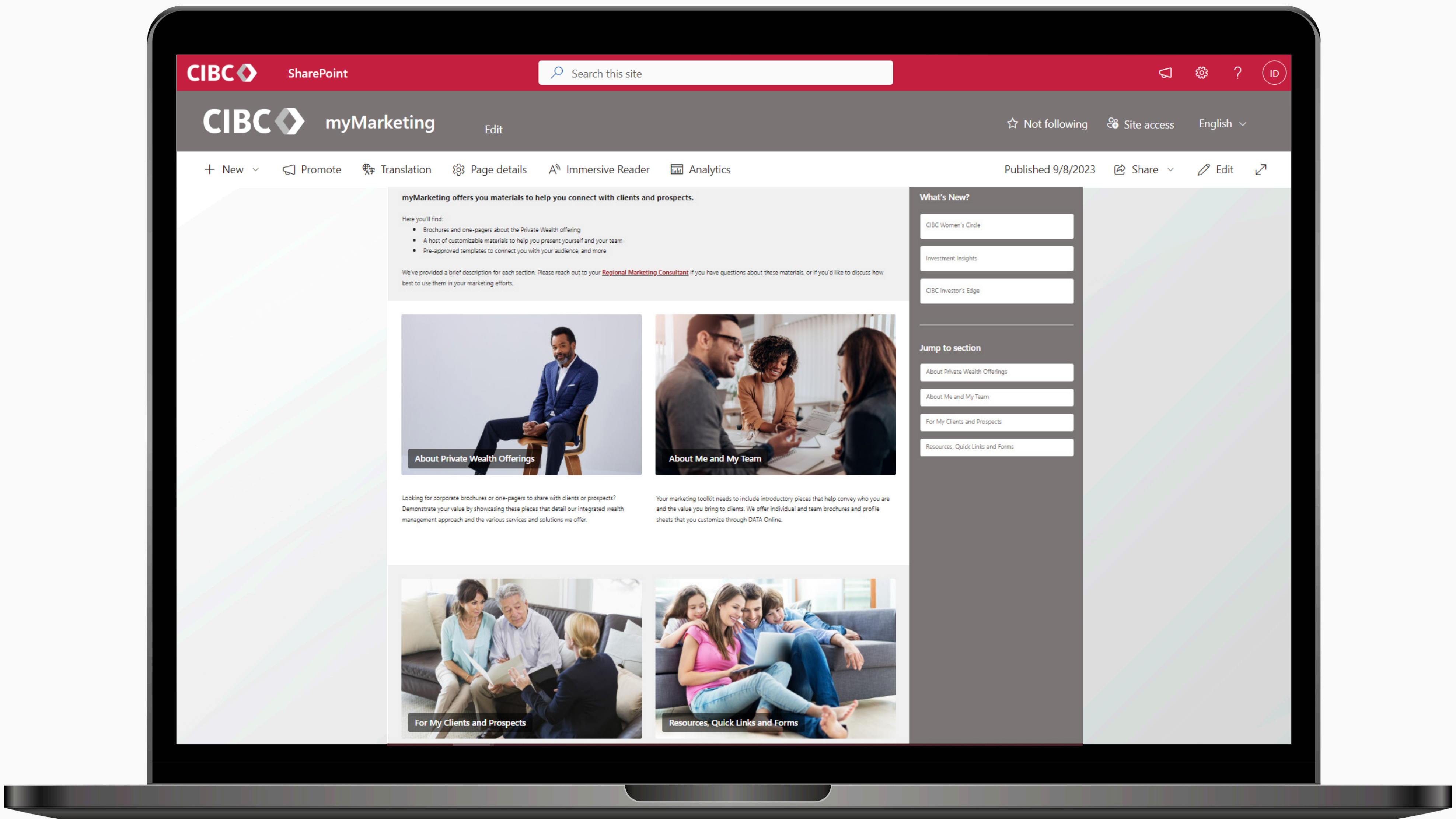
“MyMarketing” - a CIBC Private Wealth internal SharePoint website that is used to store, organize, share, and access information between Marketing Managers and Investment Advisors.

I was part of the team that built and maintained this site housing over 500 marketing assets. This assisted in making the user experience for the 900+ Advisors resourceful as it was a one-stop shop for their print and digital asset needs which they shared with their clients and prospects. Brochures, client email letter templates, investment insights, digital and email templates were readily available for quick downloads.

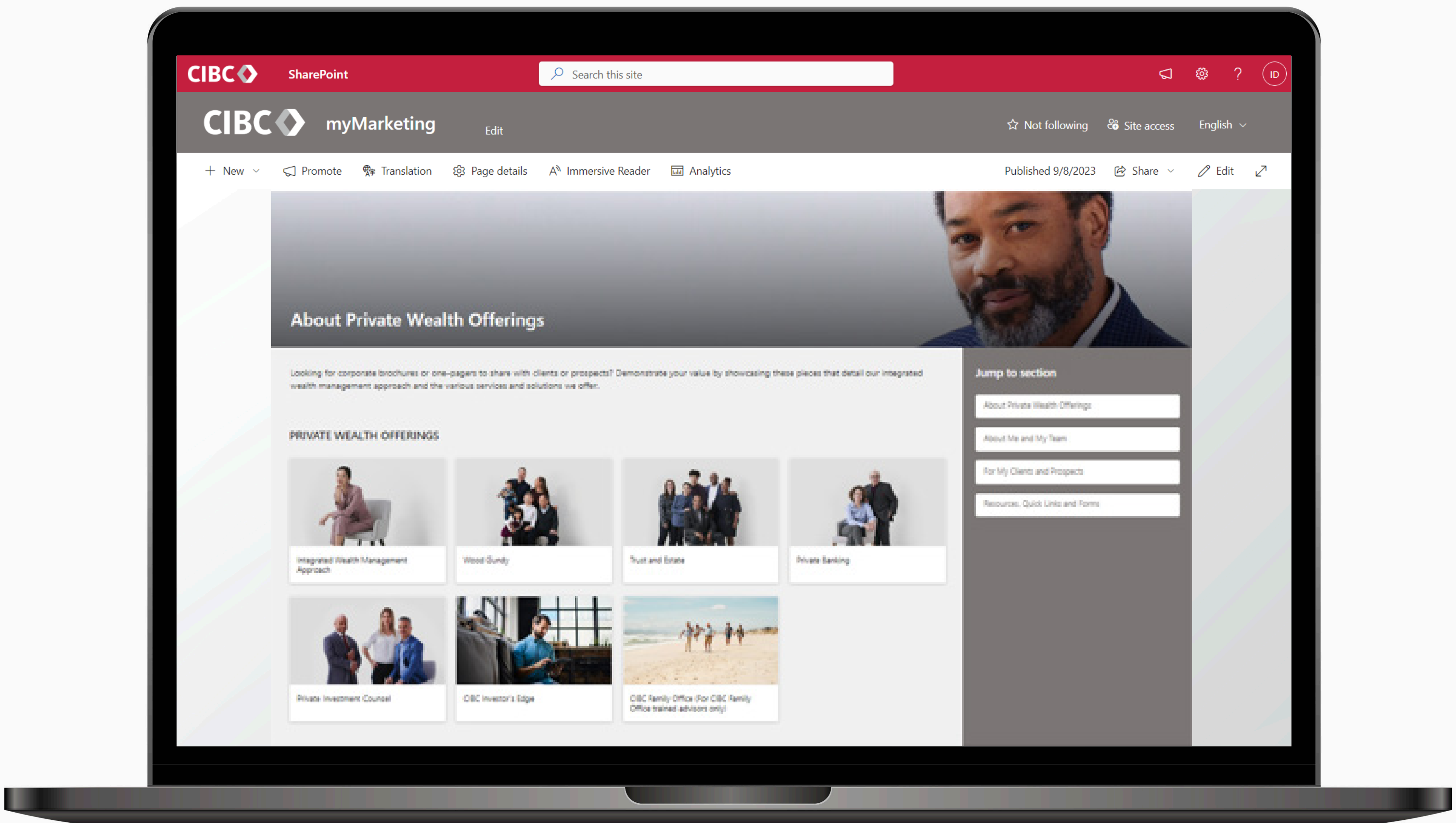
As we built this site internally rather than using an external vendor to build and maintain it resulted in savings for the business of close to a $1 million annually.

The following shows a sample of pages and assets of the site.

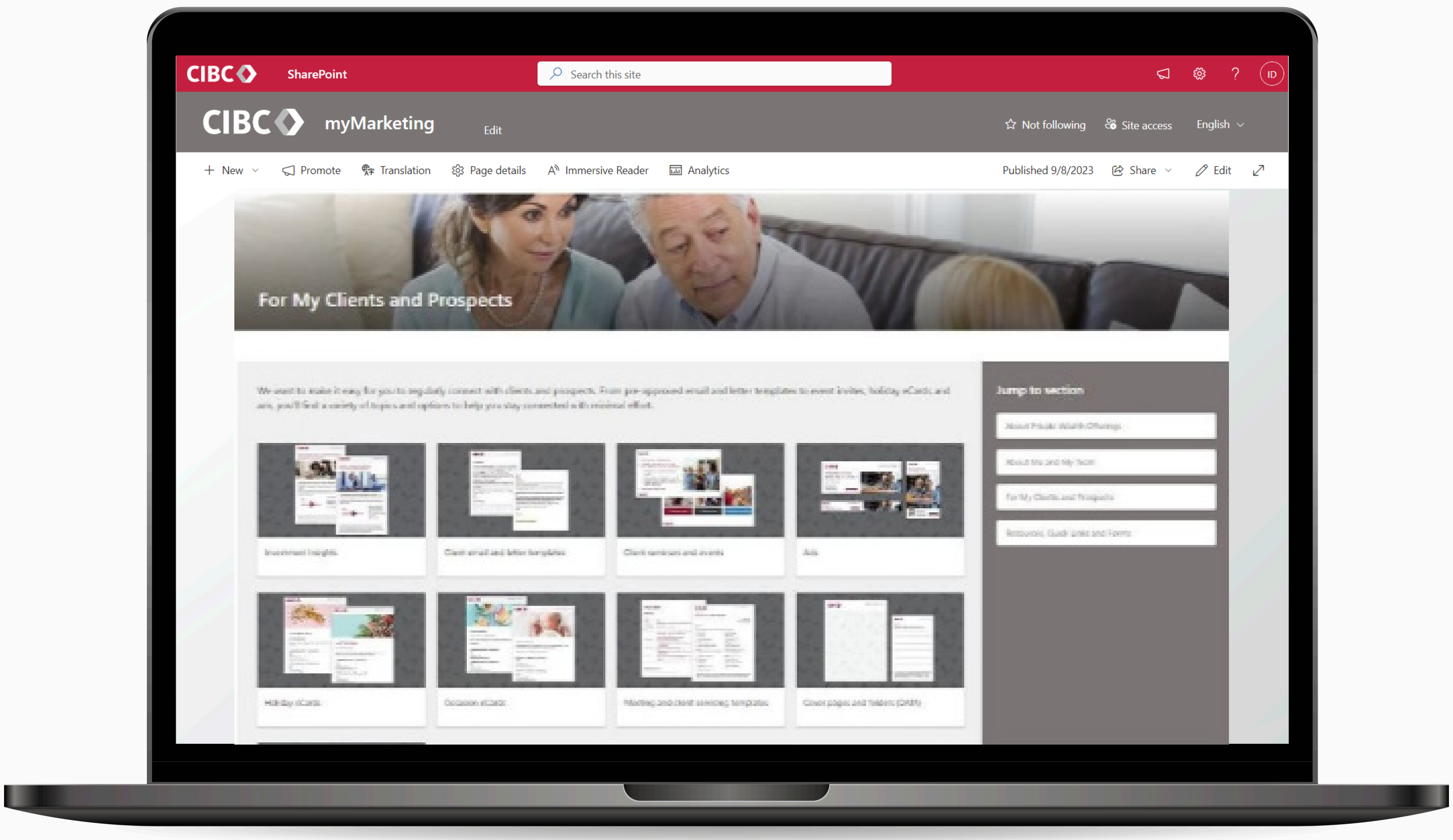
CIBC Private Wealth - MyMarketing
Homepage consists of ‘About Private Wealth Offerings’, ‘About Me and My team’, ‘For My Clients and Prospects’, ‘Resources, Quick Links and Forms’.
Advisor print and digital materials to share with clients and prospects.



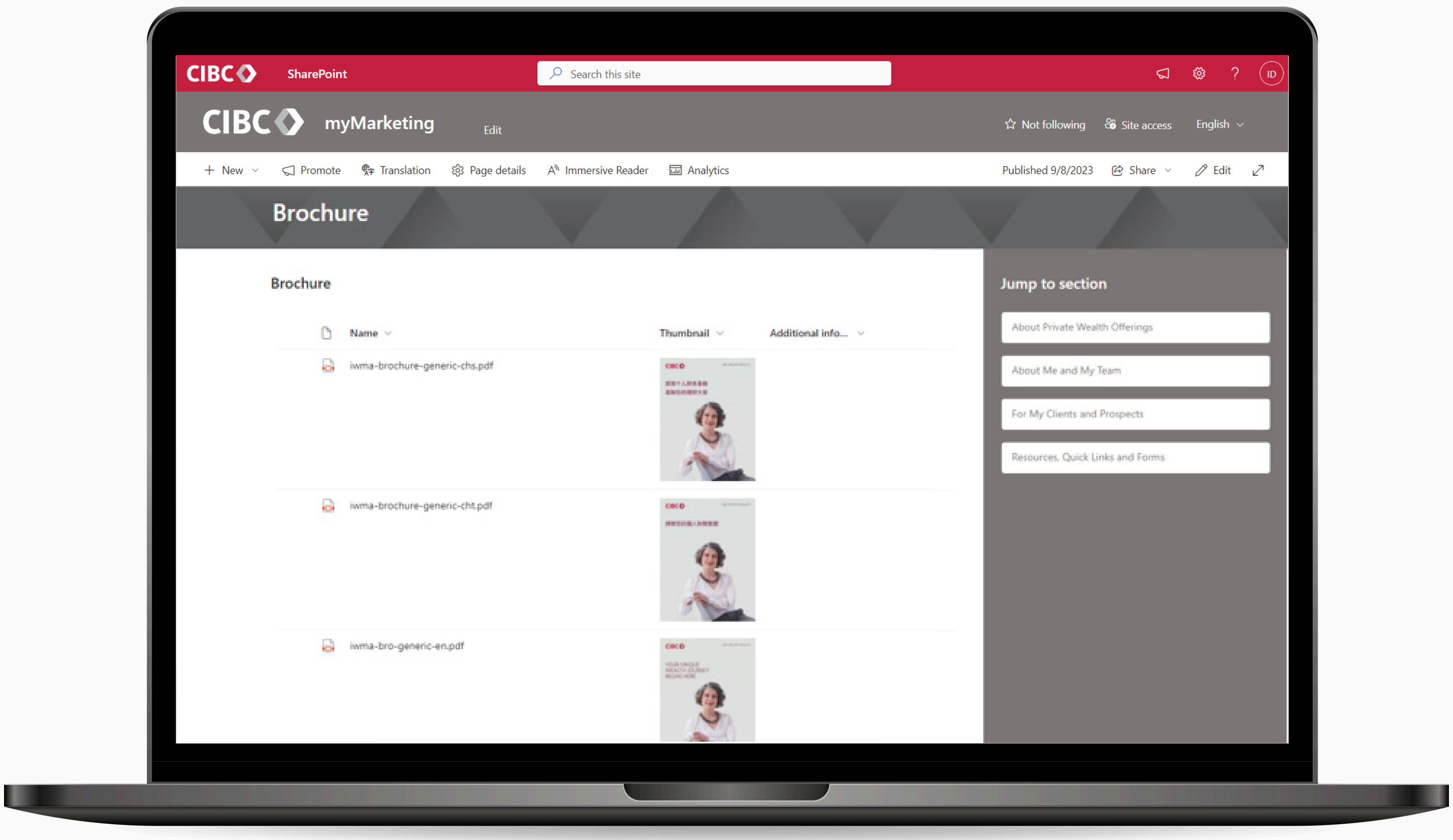
CIBC Private Wealth - MyMarketing
‘About Private Wealth Offerings’- brochures and one-pagers
Advisor print and digital materials to share to use with clients and prospects.



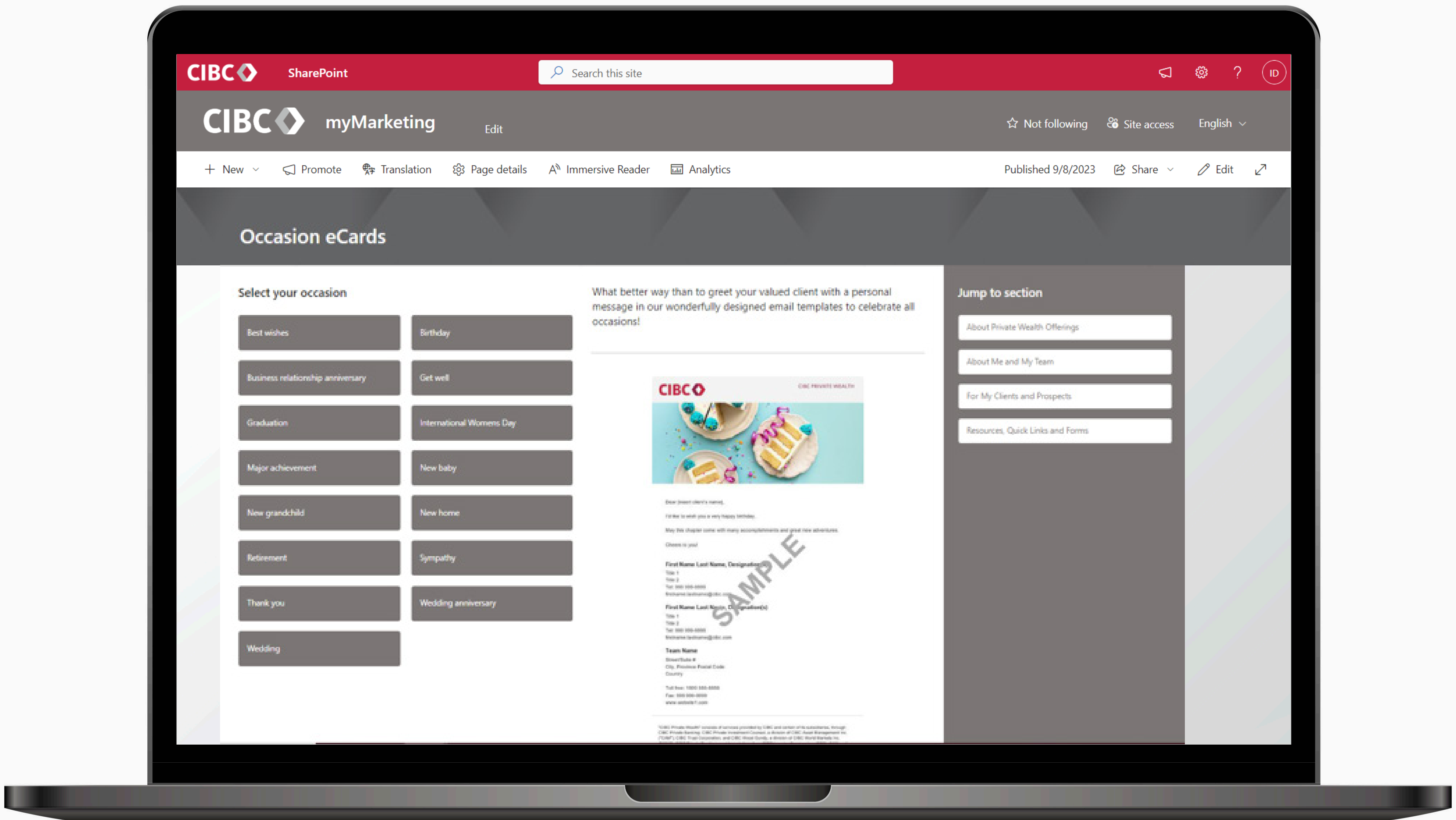
CIBC Private Wealth - MyMarketing
'For My Clients and Prospects'- email and letter templates to event invites,
holiday e-cards and ads for Advisors to use to connect with clients and prospects.



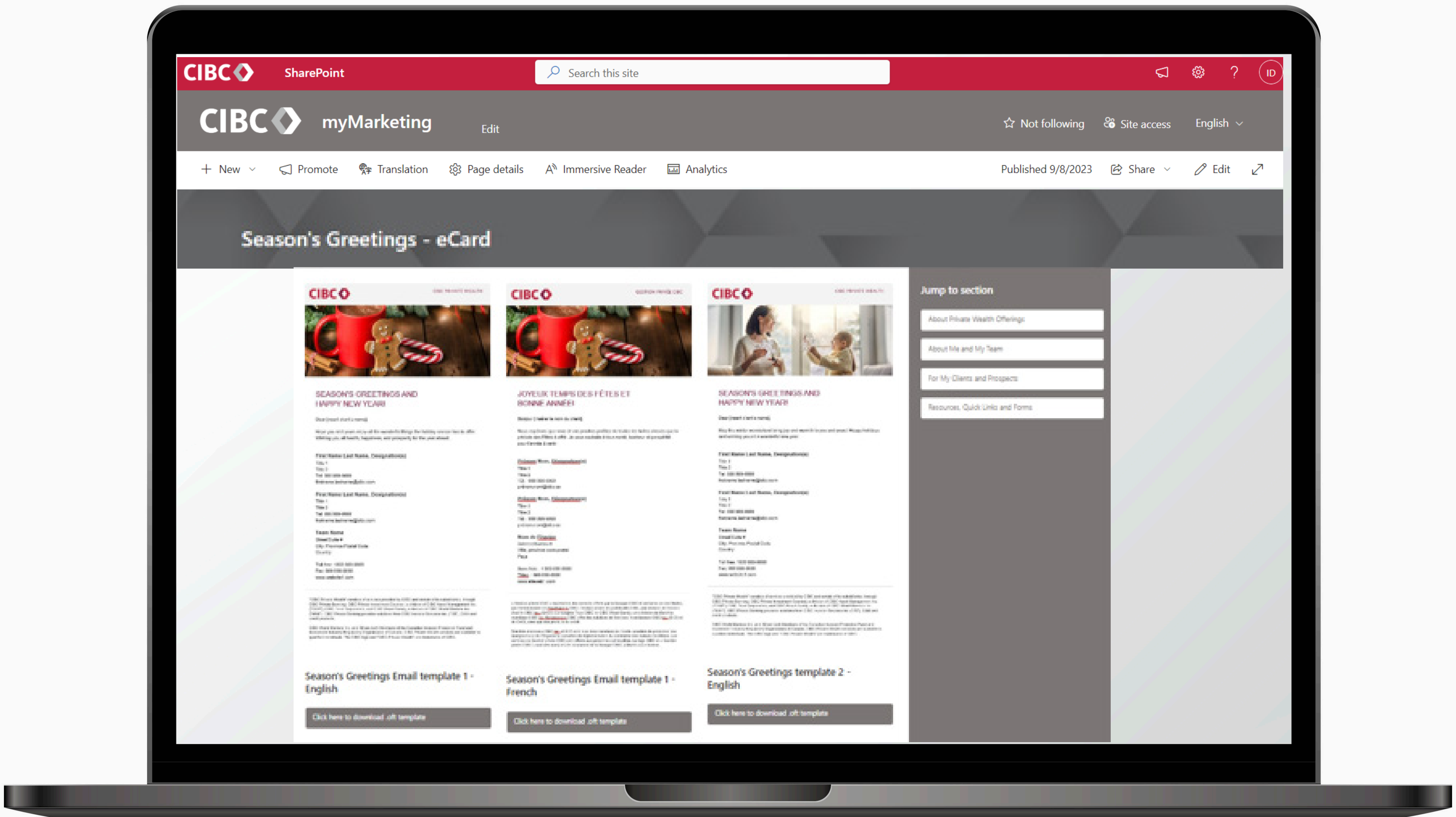
CIBC Private Wealth - MyMarketing
Brochures that outline the Integrated Wealth Management Approach and various services and solutions for Advisors to showcase to clients and prospects.



CIBC Private Wealth - MyMarketing
Email templates of Occasion eCards for advisors
to greet clients with personal messages.



CIBC Private Wealth - MyMarketing
Sample of eCards in English and French



CIBC Private Wealth - MyMarketing
For Family Office advisors offers materials to help connect
with ultra-high-net-worth clients and prospects.