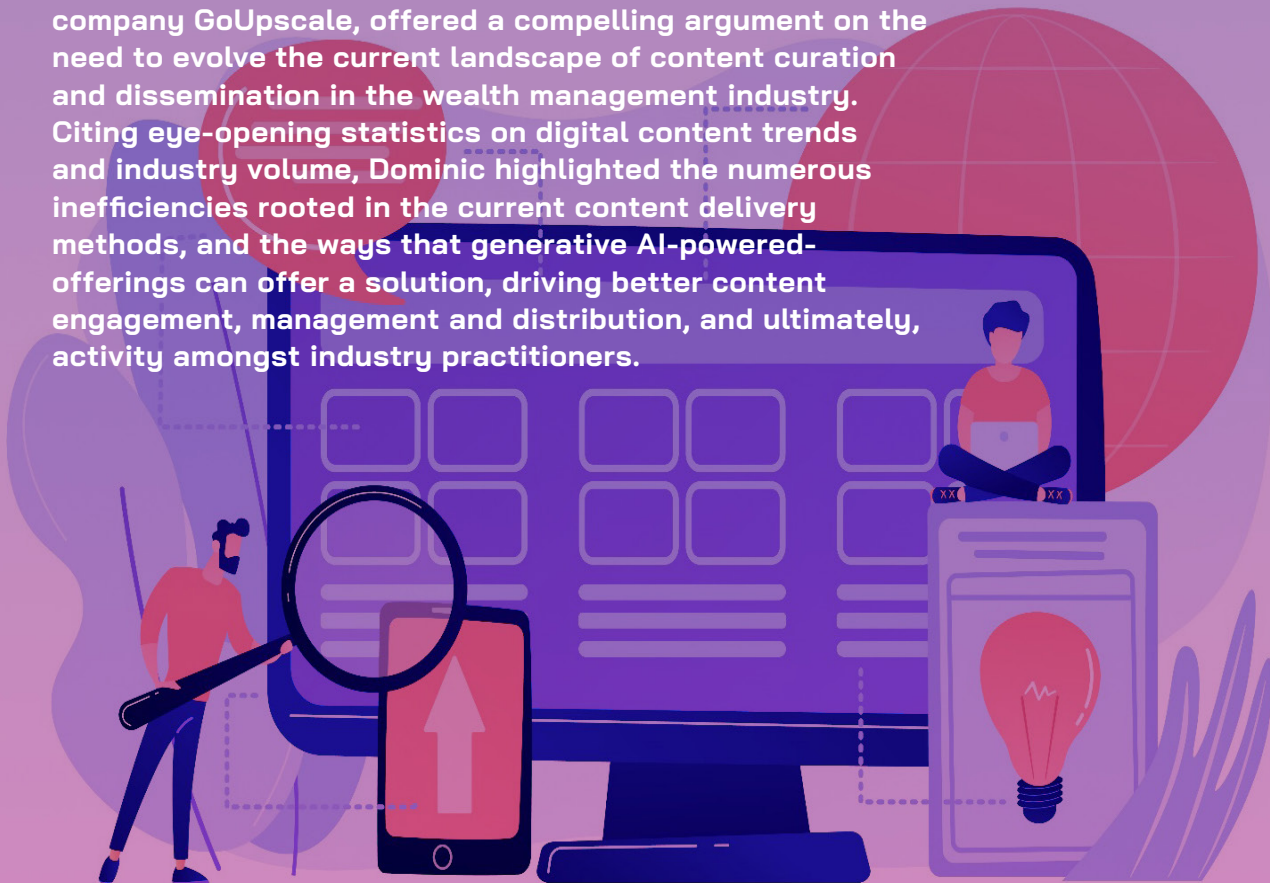


(Go)Upscaling Content Delivery with GenAI in Asian Wealth Management

In his insightful presentation at the recent Hubbis Investment Forum in Singapore, Dominic Gamble, CEO and Founder of smart content engagement technology company GoUpscale, offered a compelling argument on the need to evolve the current landscape of content curation and dissemination in the wealth management industry. Citing eye-opening statistics on digital content trends and industry volume, Dominic highlighted the numerous inefficiencies rooted in the current content delivery methods, and the ways that generative AI-powered offerings can offer a solution, driving better content engagement, management and distribution, and ultimately, activity amongst industry practitioners.



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DOMINIC GAMBLE
CEO and Founder
GoUpscale

Dominic Gamble opened

his presentation with a brief introduction to himself. “Who am I? I have been in wealth and asset management for my sins for nearly 23 years. I was a private banker for half of my career, and I’ve been lucky enough to build a few businesses, and sell them. I co-founded GoUpscale two and a half years ago, and we are in content engagement technology business.”

He went on to highlighting the focus of his presentation – content. This, he reported, is one of the biggest challenges the wealth and asset management industry must tackle in the coming years. Why? “Content is severely behind the times,” he reported. Dominic presented some compelling statistics, revealing that on average, people consumed seven hours and

19 minutes of digital content daily, with a significant portion of over two hours spent on social media. He stressed the growing trend of video content consumption, setting the stage what was to come.

Dominic highlighted the overwhelming amount of content being generated and distributed, particularly in the wealth and asset management industry, where professionals frequently receive numerous research reports and collaborations. “It’s a disaster, I’m afraid,” he noted, referring to the inundation of content that practitioners are receiving every single day.

However, before proceeding, he answered an important question: what is ‘content’ in the context of the wealth and asset management industries? He described it as encompassing various elements like news, research, thought leadership, product materials, and company overviews, delivered in diverse formats including videos, audios, graphics, and PDFs. Dominic expressed his concerns about the inefficiency of current content delivery methods, particularly heavy, long-form PDF reports used to distribute research findings, market updates, and so forth. Not just unsuited for mobile consumption, the dissemination of text-heavy content, he noted, alienates the modern reader.

In turn, Dominic expressed astonishment over the lack of data collection in the wealth and asset management industry’s content distribution workflow. He referred to a ‘disengagement phenomenon’ observed at GoUpscale, where highly qualified and well-compensated teams create content that ultimately goes unread, with the majority getting lost in a sea of flooded inboxes, meaning even one’s own company collateral gets missed. Further still, this lack of engagement is not being measured or addressed, leading to inefficiencies in the content distribution process.

Armed with a report from Accenture, Dominic turned his attention to the fact that there is a significant desire for quality content in the modern era, despite such a saturation of it, particularly in the eyes of the modern client. “Clients really value content,” reports Dominic, “and they value it a lot more than what RMs realised. And particularly, more than what the CXOs realised, too.”

So, having established there is a want for content, how is content to be curated and delivered in an effective way? Dominic honed in on the concept of ‘audience’, highlighting that these days internal teams’ digital behaviour mirrors that of prospects and clients. He underscored the

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necessity of viewing content distribution to RMs as akin to sending it to prospective clients. "It's critical to make content what we call 'snackable'," he says. "The PDF is still there, it's just at the bottom of the 'the content pyramid of engagement'", he explains, referring to his slides. "The content that's generated, particularly by the research teams, with lots of words, is really good. But the way that it's packaged up and distributed is just not digestible. That's the issue," he highlighted.

He then demonstrated how various formats can enhance content accessibility and engagement. One example he cited was transforming a lengthy document into an Instagram-style story, thereby making it more appealing and digestible. He also discussed converting lengthy

newsletter content into engaging video formats.

Discussing the development of GoUpscale's software, Dominic noted the challenges faced by subject matter experts who are not necessarily skilled in engagement or design. Their software addresses these challenges by providing pre-templated solutions and incorporating generative AI, enhancing content engagement. He then explained the role of generative AI in transforming traditional content formats, like PDFs, into more engaging and digestible formats while ensuring compliance. He showcased an example of content produced by generative AI from a PDF, as well as two videos featuring 'himself' produced entirely by AI, one in English, and one in Cantonese.

This proved an opportune moment to describe the practical considerations around implementing these solutions. Dominic emphasized the ease and cost-effectiveness of this transformative, generative-Ai-centric approach. "Video can be produced from just a photo of my LinkedIn profile. No production, no facial scanning, just a photo." Methods such as these empower businesses to create more engaging content without significant investment, allowing for better optimise content strategies, and therefore better ROI on content produced.

Discussing the tangible results seen by clients, Dominic noted significantly higher open rates and increased sales team activity, correlating positively with revenue. He also touched on additional benefits, such as improved morale among relationship managers (RMs) and increased productivity.

Bringing his presentation to a close, Dominic emphasised the need to focus on content strategy in the industry, overshadowing the importance of technologies like RegTech and portfolio allocation tools. He identified content as a critical, yet overlooked, aspect ("the hidden elephant in the room"), especially considering the upcoming wealth transfer from older to younger generations who may not engage with traditional formats such as PDFs. "We need to pick up our content game," he said. "The great news is that there are now baby steps you can take, found in the shape of cost-effective tools, which can help you do that today." ■

WANT TO GET INVOLVED IN FUTURE EVENTS?

On GoUpscale's website, the platform states its claims on what it is aiming to achieve. This is what they say:

"In today's fast-moving digital era, organisations are struggling to keep pace. The most important metric of all is under sustained pressure - sales. Without sales there is no business, and yet today's traditional sales and marketing strategies are saturated, stale and stagnating. Customers are repelled by being pushed products that do not match their needs. Time poor, under-tooled sales teams have little to rely on than their own intuition, which is a strategy that sadly results in demoralised teams with a high turnover. Management do not get visibility on sales team activity and have to make strategic decisions flying-blind. Sales, and marketing, need new forward-thinking technology to drive not only more sales but better sales too.

GoUpscale is here. We are engagement software that takes your sales performance to another world - driving big revenue gains and delighting your clients at the same time. GoUpscale puts content at the heart of the sales process with a digital catalogue, fostering story-telling and equipping sales teams with hyper-personalisation tools that give them the 'what, why, when and how', they can maximise their customer relationships and achieve success. Sales management becomes easy and intelligent with our rich data insights, banishing the unpopular and arduous manual activity reports to the scrap heap and getting your teams collaborating and motivated.

Say hello to a structured digital sales process. GoUpscale is beautiful to use, easy to deploy and cost-effective with flexible per user pricing. Do not get left behind. Climb aboard the GoUpscale rocket and let us take you to the new world of digital sales."

FIND OUT MORE ABOUT DOMINIC GAMBLE

With over 20 years of experience in wealth management, and two successful start-up exits, Dominic launched his third start-up and what he considers his most exciting venture yet in early 2021.

By way of background, after graduating from London School of Economics, he started his career trading fixed income and derivatives at Credit Agricole Indosuez in 2001. Two years later he moved to Credit Suisse First Boston Private Bank and then became a founding member of the UHNW and Family Office team at Deutsche Wealth Management in London.

Dominic left private banking in 2011 to help establish Europe's largest B2C wealth management marketplace, which he then expanded to Asia in 2014. Both businesses were sold to regional wealth players.

In 2018 he then launched and led the Asia-Pacific operations of an established European CRM wealth-tech. He has been named in the global top ex-bankers in FinTech and is on the curriculum board for Singapore Management University's 'Wealth Management' Diploma.

And all those moves led him in 2021 to co-found and launch GoUpscale's content engagement platform, designed to help drive more and better audience engagement for wealth management, asset management, securities brokerage, insurance and wealth-related industry organisations.