

# Financial Services Organization Drives Customer Success with Semaphore Cloud-based, Smart Metadata Hub

## CASE STUDY

INDUSTRY  
Financial Services

PRODUCT  
Progress® Semaphore™

### SUMMARY

A financial institution that provides personal and commercial banking, wealth management and financial market services to their clients, sought to better access and control the rapidly growing volume of data flowing into the organization to both manage risk and improve ROI. It leveraged Progress Semaphore Cloud's SaaS platform for its ability to help meet search and compliance requirements while streamlining costs associated with hardware acquisition, provisioning and maintenance.

## Challenge

Whether your organization operates 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 require 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.
- Better meet compliance requirements with regulatory mandates to decrease risk and avoid sanctions.

## Solution

The company realized that 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. This data is vital to managing the business and providing a robust customer experience in today's ever-changing environment.

The institution chose Progress® Semaphore™ Cloud because it provides a flexible solution that supports their ability to geographically segregate enterprise data, which allows the organization to better 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/SharePoint 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.

**Today, information is easy to find and the user search experience provides trusted and relevant results.**

**Semaphore's ability to quickly auto-classify content and apply precise, complete and consistent metadata, delivers transparent and accurate search results.**

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.

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, including 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 organizational data, conversations happening throughout the enterprise and end-user content stored in Microsoft repositories.

## Results

Semaphore's ability to quickly auto-classify content and apply precise, complete and consistent metadata, delivers transparent and accurate search 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.

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.








Do you need to improve the search experience and harmonize data across the enterprise?

**Consider Progress Semaphore. Learn more.**

## About Progress

Progress (Nasdaq: PRGS) empowers organizations to achieve transformational success in the face of disruptive change. Our software enables our customers to develop, deploy and manage responsible AI-powered applications and experiences with agility and ease. Customers get a trusted provider in Progress, with the products, expertise and vision they need to succeed. Over 4 million developers and technologists at hundreds of thousands of enterprises depend on Progress. Learn more at [www.progress.com](http://www.progress.com)

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