



CASE STUDY

How CMB Monaco turned a luxury wealth management experience digital

Discover how CMB Monaco uses Secure Messenger to deliver a premium, compliant, and digital wealth management experience.

60%

Secure channel adoption

25-35%

Increased onboarding efficiency

100%

◆ Premium experience ◆

Olivier Pagès is Chief Innovation Officer and Chief of Staff at CMB Monaco, a private bank that manages around 20 billion euro in assets.



The bank operates in a highly competitive financial market and boasts a top 5 market position among Monaco's leading wealth management institutions. During Unblu Impact Day, Olivier shared the ongoing digital transformation initiative that the bank has been working on since 2022. Olivier believes that "tradition alone is no longer enough," which reflects their commitment to digital transformation - and yet he also maintains that the digital experience should come second in the equation.

New capabilities should facilitate client interactions, while also making bankers' lives easier. This is the philosophy that the bank has been following while working with four key providers.



Key digital use cases



CMB and Unblu: Understanding the engagement layer

Introducing **CMB Connect** – a new secure messaging service powered by Unblu Secure Messenger.

The challenges to overcome



Clients forced into unofficial apps



Email limitations



Clunky remote advisory

The heart of the issue

“ Forbidding WhatsApp is mission impossible

– Olivier Pagès

As most wealth managers are aware, it is difficult to avoid popular messaging platforms like WhatsApp. This is why Olivier says it is essential to provide an alternative.

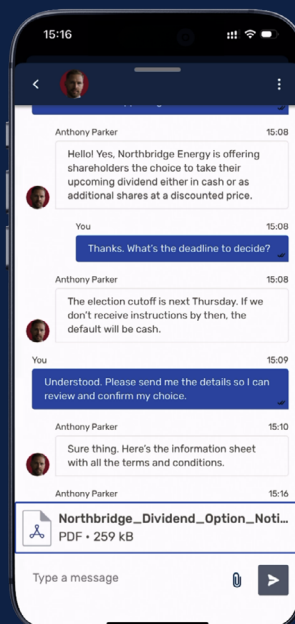
Providing a 100% premium experience



Unblu is a gamechanger

Olivier Pagès

Chief Innovation Officer and Chief of Staff



Avoiding compliance issues is an important benefit of Unblu Secure Messenger, but Olivier and his team want to go far beyond this. They want nothing less than ensuring that their clients get a “100% premium experience”.

It is a way to directly, instantly, and securely share documentation with all customer demographics, speeding up the collaboration process and ensuring client needs are being met.

What do they expect from this initiative?

The initiative has just gone live. But Olivier is confident in the project.



But beyond the expected KPIs, Olivier has also identified the benefits of Unblu that are proving transformational for all stakeholders.

For clients	For bankers	For CMB Monaco
Faster, safer, more personal	Stronger client relationships, less friction	Sustainable, profitable growth. An image as an innovative modern player.

Want to elevate digital engagement for wealth clients with secure, personalized interactions?

Get in touch - we'll show you how top wealth managers use Unblu to strengthen relationships and enhance advisory experiences.

[Request a demo](#)

