

Client Success Story **CIBC**

How CIBC Scales Investment Insights Through Trusted Data and Integrated Workflows

"One of the things that I've experienced firsthand with Morningstar is the trusted partnership."

Margaret Adaniel
Vice President of Wealth Digital, Marketing & Communications

Company
CIBC

Application used
Morningstar Direct

Use cases
Data analytics
Research
Workflow integrations

Industry
Wealth Management

As the Canadian Imperial Bank of Commerce (CIBC) continues to evolve its asset management and wealth businesses, the firm is focused on a simple goal: helping advisors and investors make more informed decisions through better access to insights, information, and digital experiences.

To support that mission, CIBC has spent more than 15 years building a relationship with Morningstar that provides trusted data, independent research, analytics, and workflow integration across multiple areas of the organization. Margaret Adaniel, Vice President of Wealth Digital, Marketing & Communications, and CIBC are helping advisors access information more efficiently, scale insight delivery, and create better experiences for clients.

The Challenge: Delivering Better Insights in a Complex Environment

CIBC serves a broad range of stakeholders across asset management, private wealth, and investor-focused businesses. Supporting those groups requires timely, reliable information that can help teams evaluate products, assess managers, understand risk, and identify opportunities for investors.

As the volume of available data continues to grow, CIBC is equally focused on how that information flows through the organization. Teams need access to insights without spending valuable time manually compiling data from multiple sources. At the same time, advisors increasingly expect faster access to actionable information that can support conversations with clients.

To meet those expectations, CIBC has prioritized creating a more connected ecosystem of data, research, and analytics.

"Morningstar is actually entrenched with all of our businesses, so it's not just a one-dimensional relationship."

The Solution: Building a Foundation of Trusted Information

According to Margaret, dependable information is essential to the way CIBC serves clients. The firm relies on trusted data and research to support investment analysis, product evaluation, performance assessment, risk oversight, and industry comparisons. Morningstar data is also integrated directly into CIBC workflows, helping teams access information where they need it most.

The importance of data quality became especially evident when CIBC experimented with a different provider for fact-sheet data. After encountering recurring accuracy issues, the organization chose to return to Morningstar, reinforcing the value of consistency and reliability in the client experience.

Beyond the technology itself, Margaret highlighted the importance of working with partners who can respond quickly and collaborate on evolving business needs.

Creating More Time for Client-Focused Insight

For CIBC, the value of integrated data extends beyond operational efficiency. By reducing the need to manually gather and reconcile information, teams can devote more time to generating insights and supporting advisors and investors.

When asked where Morningstar creates the greatest value for the organization, Margaret summarized it in three words:

"The way Morningstar creates value is really three words. Consistency, depth, and scaling."

The combination of data, research, analytics, and workflow integration supports a more scalable operating model, allowing CIBC teams to spend less time managing information and more time delivering actionable insights to advisors and end investors.

Looking Ahead: Enhancing the Client Experience

As CIBC plans for the future, three priorities are shaping the organization's strategy: client experience, artificial intelligence, and automation. Margaret explained that while innovation is critical, financial institutions must adopt new technologies thoughtfully, balancing speed with security, governance, and trust.

To support those goals, CIBC is investing in new digital capabilities, including the development of a digital storefront that will modernize both its public-facing and advisor-facing asset management experiences. The initiative is designed to create a more connected digital ecosystem that helps advisors and investors access information more effectively.

By combining trusted information with modern digital experiences, CIBC aims to help clients navigate an increasingly complex investment landscape while positioning the organization for continued growth and innovation.

A Partnership Supporting Long-Term Success

For more than 15 years, CIBC has leveraged Morningstar's data, research, analytics, and integration capabilities to help support advisors, investors, and internal teams. As the organization continues to advance its digital strategy and explore new opportunities in AI and automation, trusted information and strong partnerships remain central to achieving its goals.

See Morningstar Direct For Yourself

Talk to a specialist about growing your business with Morningstar Direct.

Margaret Adaniel and CIBC have not received any cash or non-cash compensation from Morningstar, directly or indirectly, in exchange for this client success story.

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