CASE STUDY

Financial Services Firm Transforms Enterprise Video Into Governed, AI-Accessible Intelligence With Vbrick MCP Server

Overview

This financial services giant manages an extraordinary volume of institutional knowledge through video. Its Vbrick Enterprise Video Platform (EVP) houses more than 375,000 video assets representing over 800 terabytes of data, with the potential to serve more than 120,000 employees across the firm.

Among its most valuable content are the firm's Equity Morning Meetings. Held five days a week, these mission-critical sessions provide financial advisors and wealth managers with insights into market trends, portfolio analysis, forecasts, proprietary research and data, agentic AI analysis, and other financial intelligence. With approximately 260 meetings each year, this knowledge base continues to grow.

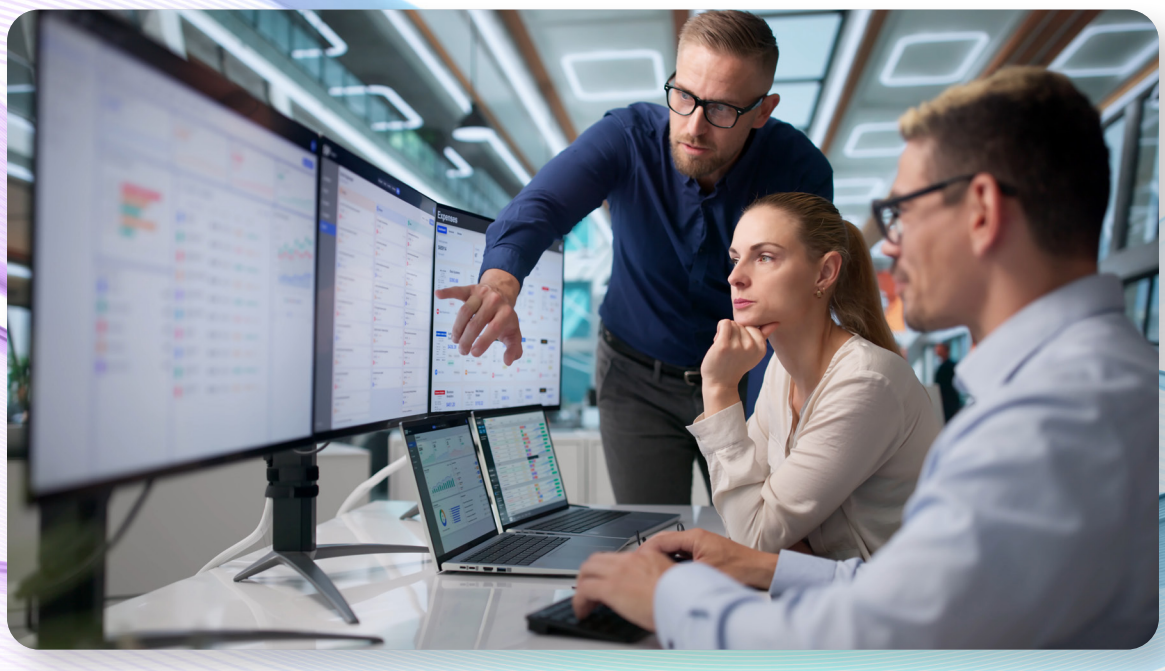
The Challenge

Equity Morning Meetings alone account for more than 100,000 video assets, approximately 27 percent of the firm's entire Vbrick video library.

The challenge was no longer simply storing and managing this content. It was making valuable knowledge within those videos easier to find as employee expectations evolved.

Rather than navigating to another application, locating a recording, and searching through the video, employees increasingly expect to ask a question through tools such as Microsoft Copilot and get a relevant answer. For this financial services firm, enabling that experience also meant meeting stringent security, governance, compliance, and regulatory requirements. Making institutional video knowledge available to AI could not come at the expense of control over sensitive information.

The challenge was clear: How could the firm make the knowledge contained across hundreds of thousands of hours of video accessible through conversational AI without sacrificing enterprise-grade control?



The Solution

The firm partnered with Vbrick on a phased approach to make its video knowledge accessible through Microsoft Copilot using Vbrick's MCP server integration.

Rather than opening its entire video library to AI at once, the firm selected Equity Morning Meetings as the foundation for a controlled pilot. The collection offered an ideal starting point: a large, mission-critical body of institutional knowledge with clear value to financial advisors and wealth managers.

Automating Metadata at Enterprise Scale

To make the knowledge within these videos discoverable through conversational AI, the firm needed to enrich the content with machine-readable metadata.

Using Vbrick's native AI capabilities and APIs, the firm automated metadata generation across the Equity Morning Meeting library in large batches, including:

- English and multilingual transcripts, including support for right-to-left languages such as Hebrew and Arabic
- AI-generated titles and descriptions
- Tags
- Chapters
- Additional metadata used for discovery and retrieval

At this scale, automation creates significant efficiencies. Manually enriching 100,000 videos at just 10 to 15 minutes per asset would require an estimated 16,667 to 25,000 hours of work. With Vbrick's AI and APIs, the firm can perform this work programmatically and consistently across its library at a fraction of the time.

Controlling What AI Can Access

The firm also wanted precise control over which video content could be made available to AI.

Vbrick worked with the firm to develop an administrative category toggle that allows specific video categories to be approved for MCP-powered discovery. Only content within those designated categories is made available through the MCP server.

This gives administrators a deliberate path for expanding AI access:

- **Crawl:** Begin with a defined collection of 100,000+ Equity Morning Meeting assets.
- **Walk:** Measure discovery, adoption, compliance, accuracy, and business value within the controlled use case.
- **Run:** Gradually authorize additional content categories and expand toward a potential firm-wide audience of more than 120,000 employees.

Compliance by Design

Making institutional knowledge easier to discover could not come at the expense of protecting proprietary information.

The firm required that verbatim transcripts not be returned through the Copilot experience. Instead, an agent between the source data and the user summarizes relevant transcript information, allowing employees to access the knowledge within a video without unnecessarily exposing the underlying transcript.

This approach allows AI to draw from the firm's institutional video knowledge while providing an additional layer of control over how that information is presented.

Vbrick as the Governed Source of Truth

Microsoft Copilot provides the conversational experience, while Vbrick remains the governed enterprise system of record for the underlying video and its associated knowledge.

Vbrick manages governance, access, retention, and expiration at the source, helping ensure information made discoverable through Copilot remains aligned with corporate policies throughout its lifecycle.

This extends the firm's existing enterprise video governance practices to AI-powered knowledge discovery.

Expected Impact and Measures of Success

Together with Vbrick, the firm established a scalable foundation for turning enterprise video into governed AI-accessible institutional knowledge with the potential to reduce manual effort and fundamentally change how employees discover information.

Automating Enrichment at Scale

Programmatically generating metadata across more than 100,000 Equity Morning Meeting videos enables the firm to enrich content at a scale that would be impractical to manage manually.

Based on an illustrative 10 to 15 minutes of manual enrichment per asset, automation represents approximately 16,667 to 25,000 hours of potential manual work avoided across the initial Equity Morning Meeting collection.

From Finding Videos to Finding Answers

Previously, an employee looking for specific market intelligence might need to locate the right meeting and search through the recording for the relevant discussion. With Vbrick's MCP server and Microsoft Copilot, employees can instead ask a question and discover relevant knowledge from approved video content.

This brings governed video knowledge into an AI experience employees already use while the underlying content remains managed in Vbrick.

The potential productivity impact is significant. If faster discovery saved an employee just five minutes per week, a 10% adoption rate (or 12,000 employees) across the firm would represent approximately 1,000 hours per week or 52,000 hours annually. At full adoption across 120,000 employees, that potential rises to 10,000 hours per week.

Building a Measurable Path to Expansion

The Equity Morning Meeting pilot gives the firm a controlled environment to validate results before expanding MCP access to additional video categories.

Key measures can include:

Time to information

How quickly employees find information before and after MCP-powered discovery.

Manual effort avoided

Hours saved through programmatic metadata generation versus manual enrichment.

Discovery success

How effectively Copilot surfaces knowledge from approved Vbrick content.

User adoption

How many employees access Vbrick knowledge through Copilot.

Knowledge utilization

Whether older video content continues to deliver value after its original broadcast.

Expansion readiness

Whether adoption, accuracy, compliance, and user satisfaction support adding new content categories.

These measures provide a framework for demonstrating business value and determining when to expand AI-powered discovery across its broader video library.

Looking Ahead

The firm's approach demonstrates how a highly regulated global enterprise can use AI to give employees greater access to valuable institutional knowledge without sacrificing security or control. By building on Vbrick's enterprise-grade security, governance, and access controls, the firm can make more video knowledge available through AI while maintaining the protections required for sensitive financial information. Rather than opening its entire information estate at once, the firm can selectively expand access to approved content, empowering employees with more information while minimizing risk.

With more than 100,000 Equity Morning Meeting videos enriched and governed for AI-powered discovery, the next phase is focused on measuring results. As the firm validates improvements in discovery, productivity, adoption, governance, and compliance, it can selectively introduce additional categories of enterprise video through Vbrick's MCP server.

The long-term opportunity extends far beyond video search. By transforming mission-critical video into governed, AI-accessible institutional knowledge, the firm is creating a controlled path to unlock greater value from its library of more than 375,000 videos for a potential audience of 120,000+ employees.

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