

BUILDING A TEAM THAT BUILDS ON MARKETING CAPABILITIES

Financial Services Company – E-Business Group: Campaign Implementation Upgrade and Training for Optimal Marketing Campaign Performance

OUR CLIENT...

...is the online business unit of one of the largest financial institutions in the U.S. They needed expert assistance to upgrade their current Unica® Affinium Campaign™ platform. They recognized that there were features and functionality in the version 7 release of the software that could greatly improve the performance and scalability of their marketing campaigns. They also wanted to enhance the reusability and standardization of their marketing campaign build and delivery process.

THEIR OBJECTIVE...

...was to enable staff to spend less time on the technical execution aspects of campaign development, and more time on business and marketing strategy.

THEIR CHALLENGE...

...was that the platform they used to run their marketing campaigns was an older version of Affinium Campaign (AC) that had not been supported by Unica in years. Following the initial installation of the software, there was a high rate of personnel turnover, including team leadership, leaving the existing team with little expertise in the software and little knowledge of the campaign logic. The current campaigns had no standard design paradigm and the objects within the application had little uniformity from developer to developer or campaign to campaign. This made it very difficult to efficiently onboard new resources. Although many of the resources on the team had been exposed to AC in other environments, the use of the software had deteriorated to a "code scheduling tool," as if the campaign management functionality within the software was non-existent.

OUR COURSE OF ACTION...

... included a three tiered approach.

1. Design & Installation

Pinpoint consultants used their expertise in installation of Affinium 7, coupled with their understanding of the business, to establish design standards. Pinpoint's holistic and comprehensive design review of all campaign processes and build techniques helped establish a standard, more streamlined methodology for all campaigns in order to reduce the time spent by users on the technical execution of campaigns.

"Band-aid Functionality"

"Standardize Reuse and Repeat!"

"Design standards were presented as a rule as opposed to an option..."

2. Campaign Conversion & Development

Next, a set of existing campaigns were rebuilt to leverage the software tool as it was intended to be used. This included the elimination, wherever possible of raw code, and the inclusion of reusable components such as: custom macros, derived fields, user variables, templates, and migration away from using the application as a scheduling tool.

3. End-User Training & Support

Finally, the team was trained both through a classroom environment and through side-by-side support to help them leverage the tool, and its wealth of functionality, as it was intended. Because the team was not committed or personally attached to the AC configuration previously in place, they were very open to suggestions and changes that would improve their campaign management processes.

Misuse of the tool would be the most challenging element to overcome. The campaign developers needed to be trained to move away from the comfort zone of developing code outside of the existing campaign software environment and using it to merely schedule the execution. Design standards were presented as a rule as opposed to an option.

THE BENEFITS...

...Pinpoint left the campaign management team with renewed confidence and a comprehensive knowledge of their marketing campaign environment. In the event of more staff turnover, they were given a take away training program, designed to help quickly on-board new resources. Design standards were captured and transferred to the team as a *living document*, to be maintained and followed moving forward. The client team is now fully invested in the quality of the environment and campaigns as never before. At the project end, the team members were empowered and free to work with marketing and business resources on new campaigns and more advanced logic.

About Pinpoint Systems Corporation

Pinpoint Systems Corporation is a leading provider of marketing solutions and marketing software implementation services that help increase the overall profitability of a company's marketing programs. Our consultants are expert marketers and technologists, with a truly creative approach for linking marketing processes and technology systems. Our clientele is Fortune 500 and mid-market companies across multiple vertical markets who benefit from our highly repeatable solutions in an environment that is extensible and expandable.

"Pinpoint was a huge asset to the team. We are finally organized, empowered and have greater confidence in building our new campaigns."

— Campaign Management Team Leader

"Pinpoint taught us to have faith in our new-found processes."

— Campaign Management Team Manager

"All in all the project has been a success based on the accomplishments and benefits realized. We could not have accomplished this without Pinpoint."

— Project Executive Sponsor