

**CASE STUDY** | Smarter Decisions with Customer-Centric Marketing Through Automated Measurement

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## CASE STUDY AT A GLANCE

### Solution Spotlight

Marketing System of Record

### Industry Vertical

Financial Services

### Business Challenges

- Need to align marketing processes with customer-centric business strategy
- Need better targeting to attribute customer actions to specific campaigns and offers
- Cumbersome to utilize campaign and response history in audience selection and segmentation
- Inefficient, manual processes to compute standard campaign and offer performance metrics
- Need to report metrics and sales trends to stakeholders

### Solution Overview

- Single Marketing System of Record stores campaign information, automatically assembles data across product lines/sales channels for each customer
- Revenue data structures and business rules that align revenue with responses to offers and campaign
- Robust reporting to measure campaign performance
- Templates for standardized use of campaign history across all campaigns and product lines

### Benefits Summary

- Improved offer targeting and ROI
- Faster time to market - easier to adapt to changing customer needs
- Automated measurement capabilities and reporting managed by Marketing with no need for IT involvement
- Ability to respond to individual customer behavior
- Automated computation of revenue associated with each offer

Pinpoint Systems helped a top ten bank to adapt faster to its customer's needs with automated multi-channel measurement and by optimizing their systems and processes for a customer-centric marketing approach.

**Marketing has gone through a dramatic shift** since the advent of CRM in the early 1990s. Companies have looked to truly create marketing that reflects the 360 degree view of the customer and, while twenty years ago this seemed like a pipedream, with the proliferation of technology that allows consumers to stay intimately connected, a customer-centric marketing organization is now a necessity.

In order to engage and respond quickly and relevantly to their customers, companies understand that developing a customer-centric strategy is more complex than ever. It is critical to not only "know" the customer, but to foster a customer base that is engaged and brand loyal.

One vital way a company can adopt the customer-centric ideal is to integrate activities around the customer, anchored by a Marketing System of Record.

### The Challenge

Our client is VP of Customer Analytics at a Fortune 500 financial services company with a team of analysts responsible for multiple product lines and business units. They wanted better ways to identify, measure, and determine the trend of what is and what is not compelling their customers to respond. Their campaigns were traditionally product oriented, with each set of product campaigns managed separately from those of other products.

They knew they needed to stop using less-adaptable, product-focused marketing strategies and adopt a customer-focused approach. A pilot customer-centric marketing program was implemented that highlighted the need to fully understand, measure and report the overall effectiveness of each marketing touch per customer and household relationship vs. solely the marketing metrics around a particular product line.

The client was challenged by the time consuming and tedious nature of the measurement work that each marketing analyst was doing, which was slightly different for each line of business. Automation was critical in order to free-up time for more strategic analysis in support of the customer-centric initiatives.

### The Solution

The Marketing System of Record solution Pinpoint Systems designed supports our client's vision and helps them navigate the complexity of aligning the needs and priorities of Marketing with those of IT. The core of the solution to optimize their marketing systems and processes includes: centralizing customer information, personalizing communications for the "right next offer," and the ability to deliver that offer via any channel at any time the customer interacts with the brand.

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*To better capture and respond to customer activity, a robust business rules framework was developed to be maintained by Marketing with no need for IT involvement and for the marketing analysts to better identify and capitalize on productive customer opportunities.*

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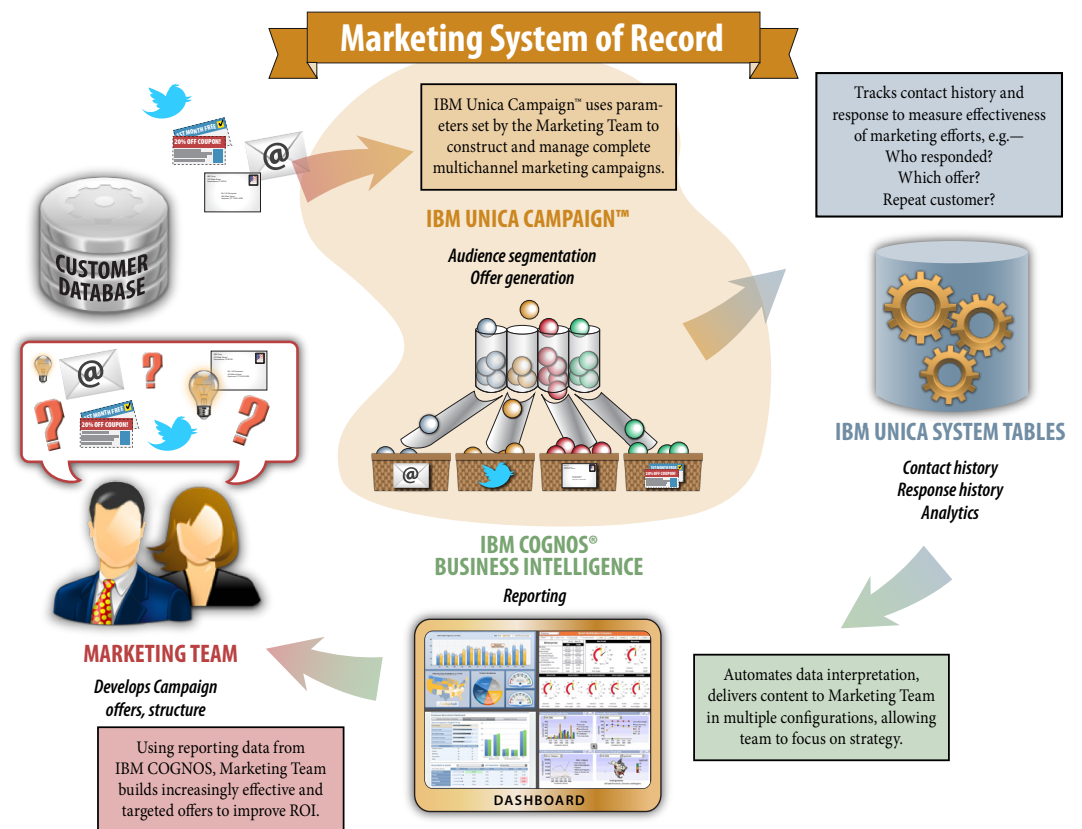
**The solution is comprised of:**

- Extensions to offer attributes, campaign attributes, cell attributes and campaign history data structures
- Templates for standardized use of campaign history across all campaigns for all product lines
- Extensions to response history data structures
- Additional revenue data structures that align revenue with responses
- Response attribution business rules
- Robust reporting that aggregates individual responses and associated revenue along multiple dimensions and at multiple levels (e.g., offers, campaigns, accounts, customers, households, customer segments, etc.)

The client used campaign management for audience selection, but they were not utilizing available campaign history, response measurement or reporting. Pinpoint's strategic guidance helped them extend their current IBM Unica\* Campaign environment and helped them to navigate the complexity of these added capabilities by introducing several new configuration extensions to provide business rules and data needed to address their business needs.

**Solution Components**

Pinpoint implemented a robust system – useful to all lines of business – and includes a “brain trust” for all of the customer history, and houses all offers and responses for that customer across all product lines and sales and marketing channels.



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## About Pinpoint

*Pinpoint Systems helps you realize the promise of real-time marketing to ensure that each of your customer interactions is more intimate and most productive. We intelligently deploy real-time marketing systems and provide EMM software consulting and implementation for Fortune 1000 and mid-market companies.*

*Pinpoint's consultants help you navigate the complexity of real-time, customer-centric marketing interactions, enabling new capabilities that maximize the value and measurability of every customer relationship. Our practical, hands-on approach combines qualitative analysis of your business needs with a deep understanding of data, technologies and tools to help you select, implement and manage real-time marketing systems with confidence and agility.*



*\*Pinpoint Systems is an authorized IBM Unica Reseller and IBM Unica SVP Partner.*

## The Benefits

By automating the measurement process with the Marketing System of Record, our client is realizing three significant benefits since the project implementation:

- **Improved Offer Targeting and ROI** – To better understand how each customer's (and household's) relationship with the company changed as a result of any given marketing campaign or individual offer, Pinpoint's Marketing System of Record is helping the client market smarter by improving their ability to select the most relevant and timely offer for each customer. The result is increased marketing ROI.
- **Faster Time to Market** – To adapt faster to customer behavior, Pinpoint consultants partnered with the analyst team to bridge the divide between Marketing and IT and create a robust response attribution rules framework. This is maintained by Marketing so no IT involvement is needed. The adaptable platform has enabled the client to deploy new programs quickly, avoiding costly and time-consuming missteps. Further, the roll-out process is not subject to IT backlogs.
- **Automated Marketing Measurement** – The fully automated measurement capability eliminates the tasks performed by analysts of gathering data and producing reports for management so the marketing analysts can focus on strategy and analysis that drive the client's customer-centric marketing initiative forward. To meet the increasing challenges of the new marketing paradigm, a revenue measurement structure was implemented that enabled revenue to be rolled up by offer, by campaign and by customer/household, without any double-counting of revenue. This important element allows for accurate measurements of customer/household revenue so intelligent decisions on next best offers could be made and appropriate budget allocated for future marketing activities.

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*Want to explore if the Marketing System of Record solution is right for your business?*

*Learn what Pinpoint Systems can do for you.*

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