

Experian Case Study

Company Profile:

An enterprise data firm in North America that provides financial data services as well as credit services to consumers and B2C companies. At the time of implementation, the firm was utilizing the following technologies: Service Cloud, Amazon Red Shift, Corvete database, Marketing Cloud.

The Challenges:

At the time, the firm was utilizing Marketing Cloud and their capabilities were limited to simple sends and importing leads from various sources. A consultant was required to map out their business processes and a strategy was required to align Marketing Cloud with their business objectives. In addition, the firm required integration with Amazon Red Shift, which meant their data needed to be cleaned and they needed to maintain their data integrity. The firm identified 5 objectives they wanted to address:

- Mapping out the entire lead process to manage database
- Be able to automate lead import activity, from various sources, while maintaining the integrity of the data
- Custom campaign UI: the ability for team members to easily create new campaigns and enter campaign meta relevant to executed campaigns
- Learning how to utilize Dynamic Content as well as be able to report on dynamic content performance
- Gain visibility into their data, specifically lead sources and being able to enter leads into email journeys based on the lead source

The firm evaluated the Informatica tool as an option to deal with the data issues, however they found the tool was better suited for Sales Cloud and did not prove to be resourceful when it came to Marketing Cloud. They needed to be able to capture and record the source of their leads, they required segmentation of leads as well as conducting campaigns and journeys. The team required extensive documentation as they didn't have the knowledge or training on the processes and having someone map out the process would aide in their adoption.

Solution Implementation:

Expertise in help and setup focusing on 3 areas: Lead Generation, Campaign Meta and Journeys. The basis of the 3 areas, starts with mapping out the processes. From there we set up:

- Campaign UI for easy campaign setup as well as the ability to enter campaign meta relevant to campaigns executed by the marketing team
- Create de-dupe process utilizing tools and queries in Marketing Cloud
- Journeys utilized dynamic content and were automatically triggered based on lead source data when new leads were entered
- Mapped out business process and providing extensive documentation to help on-board marketing teams

Results

In just one month, the data firm was able to input more than 1 million leads along with lead source data into the database. 800,000 leads were net new and were automatically matched and de-duped

Email journeys for leads has aided in lead conversion, both free and paid customers
Campaign UI is easy to use and the marketing team is able to create custom campaigns that are available for reporting to senior executives