Actable Creates Strategy to Design & Build a Customer Database for Financial Services Company

Challenge

The customer's business drove both B2B and B2C marketing strategies, which resulted in siloed data environments for vendor data management and marketing data management, which did not have integrations to support reporting, analytics, and outbound activation in marketing channels.

Marketing activities required manual processes, which created significant inefficiencies in report creation, campaign planning, and marketing execution. This also inhibited the ability for the customer to deliver more tailored and trigger-based experiences to both vendors and customers.

Solution

- Leveraged comprehensive **maturity assessment criteria** to evaluate the customer across 30+ MarTech capabilities
- Emphasized areas of need to explicitly support a strategy to **enable both vendor and consumer marketing**
- Developed a recommendation, inclusive of 25+ **quick win opportunities** and **big bet initiatives to drive value long-term**
- Assessed recommendations by effort and impact to inform a **3-year roadmap,** with supporting **investment and resource summary** to highlight cost and resource estimates to fulfill roadmap
- Scoped level-of-effort and resourcing needs required to **execute a big bet initiative to design and build a customer database**, with priority data sources and use cases documented

Results

Actable successfully delivered a recommendation with buy-in from both technical and marketing stakeholders. The recommendation and roadmap drove alignment between the two functional areas, and Actable immediately actioned towards the roadmap by scoping the tactical needs to design and build a customer database, inclusive of both vendor and consumer data. The customer will make progress towards its first big bet initiative by the end of 2024, while achieving quick wins in parallel.