

# 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.

Recommendations: Data

Code	Name	Description	Priority	Cost Effort	Impact
D1	Customer Data Store MVP	Integrate key data sources across sales & marketing into a consolidated location to enable the creation of a full view of customers and the ability to build more informed decisioning	Big Bet	High	High
D1a	Customer Data Store enhancements	Iteratively			
D2	Consent Management Capture & Consolidation	Capture Consent and preferences in customer data store and enable consent capture across channels to ensure compliance with privacy regulations and meet customer needs	Tactical	Medium	High
D3	3 <sup>rd</sup> party Data Lab / Analysis	Explore alternative data sources to DBE that focus on SMB for identifying higher targets. Compare match rates against existing customers to evaluate highest probability buyers.	Quick Win	Low	High
D4	Data Collaboration with Regions Bank	Once data is available in environment, set up secure data sharing with Regions for cross-marketing with look-a-like customers of Regions.	Quick Win	Low	High
D5	Digital Asset Centralization	Enable digital assets (copy, creative) to be used across sales & marketing channels more effectively, either through a DAM or other simplified management tool (i.e., Actable)	Tactical	Medium	Medium
D6	Data Activation tool implementation - Phase 1: Audience Management	Select and implement a FREE version of a tool for sending customer data to Hubspot for activation.	Quick Win	High	High
D7	Data Activation tool implementation - Phase 2: Sales & Vendor Activation	Implement additional destinations to PMA/vCRM and enable alerts to the sales team on new leads.	Tactical	Medium	High
D8	Data Activation tool implementation - Phase 3: Identity Resolution & Data Unboarding enhancements	Consolidate customer profiles & increase match rates to downstream activation channels (social media, retargeting)	Tactical	Medium	High

