



DATA CONVERSION



Transforming Highly Complex &
Sensitive Data into a Crucial Customer
Engagement Touchpoint

Case Study



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Challenge

The Financial Institute had an annual project which was key to their annual customer engagement plan.

However, the project was prone to schedule overruns due to the complex nature of the data and the volumes of recipients.

The Financial Institute needed a trusted and discreet partner that could securely manage this project and liaise with the multiple stakeholders involved in the same.

Solution

This project required a collaborative team approach between multiple departments within both the Financial Institution and Dataconversion to ensure the raw data was correctly transformed for mailing purposes without compromising the security and integrity of the data, or the look and feel of the Financial Institute's brand.

There were numerous non-standard data variations as well as variable and personalised content on the physical piece.

In addition to this, due to the fact that the data had to be extracted from the Institute's core system at the penultimate moment, Dataconversion had to incorporate a degree of flexibility into our solution process that matched the Financial Institute's internal processes and requirements.

Dataconversion's team created a bespoke campaign platform that included an ETL process designed to integrate with the branded and variable content of the end-mail piece.

This platform also allowed for rigorous quality assurance to ensure 100% confidence in the end output.

Furthermore with our print and fulfilment facilities, we were able to produce this campaign in the most cost-effective manner and within a secure environment for the Financial Institute, maintaining meticulous control over the multiple, personalised content for each customer.

The mailing was despatched on time and at the most economical postage rate available to the Financial Institute.

Results

Not only was the campaign completed on time and in budget, but the bespoke platform that was built for this project is fully customisable and has been used to deliver value across other campaigns for the Financial Institute.

“The main reason we chose Dataconversion over others was

- a) the fact that you do not force clients down rigid processes and timelines and
- b) the quality of the account management.

We needed the ability to turn things around quickly and that allowed us to adapt to things as they changed in our business and in the industry.”

Head of Customer Propositions, Segmentation & Insights, The Financial Institution.



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