

Large Financial Services Company Turns Partner Organizations into Marketing Powerhouses

The Business Challenge:

A large financial services company leverages a nationwide distributed partner network to grow their customer base by promoting their products and services to their partners' clients. However, the company found it difficult to empower their partners to promote these offerings at the local level. While there was a lot to be gained from introducing each partner's unique target audience to the financial service company's offerings, the reality was that these partners often didn't have the time, expertise, or resources to create effective marketing campaigns. Nor did the financial institution have the bandwidth to create hyperlocal campaigns on behalf of every partner.

If the financial services company was going to use these partnerships to support national marketing efforts with more granular, localized campaigns that would grow its customer base, it needed a way to streamline local efforts without jeopardizing the brand or quality of campaign assets. The company needed to maintain control over its branding, including design, messaging, and especially the legal and regulatory language that's specific to their industry, but may be unfamiliar to partners. Additionally, as partners executed local marketing campaigns, the financial services company needed to be able to guarantee the privacy and data security of both their company's users and their partners' customers.

Ultimately, the financial institution determined they needed a single-point solution that could integrate with the additional systems they and their partners use, enabling the company to control its branding, while empowering their partner companies to quickly modify, supplement, and build ad hoc campaigns tailored to their local audiences—all with airtight user privacy and data security.

Business Goals:

- Maintain brand control over print and digital marketing assets
- Empower partners to create and execute local campaigns
- Ensure legal and regulatory compliance
- Protect user data and privacy — for their users and their partners' clients

OneTouchPoint's Solutions

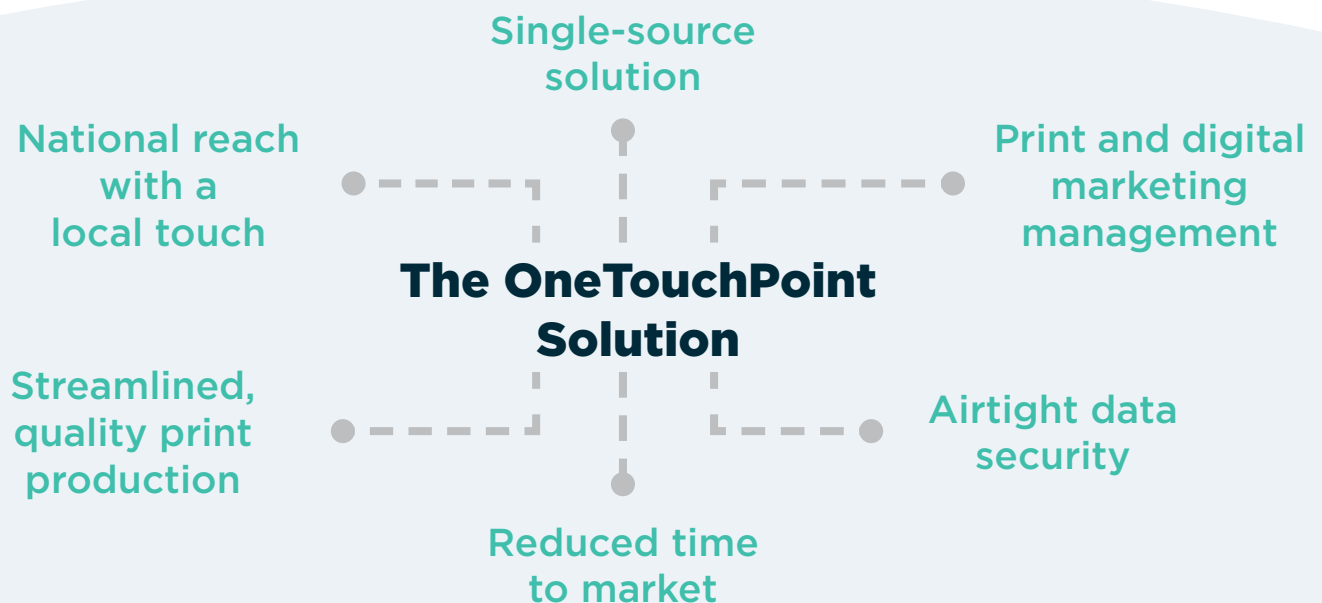
OneTouchPoint's [U.Connect](#) is a single-source marketing supply chain management platform that was designed with exactly this use case in mind.

As a repository for preapproved digital and print assets with customization opportunities for local marketers, OneTouchPoint allows distributed and multilocation brands to create national marketing reach with a local touch. This empowers the financial institution's local partners and lightens the national financial organization's marketers' loads, all while maintaining brand integrity and quality standards for everyone involved.

U.Connect supports both digital marketing assets and traditional print marketing, allowing local users to order everything from postcards to point of sale materials—in small quantities or at scale—directly through the platform. This gives the financial services company assurance that their materials stay on-brand and print quality meets organizational standards. It also provides budget transparency to ensure partner organizations aren't exceeding their allowance for customized campaign materials—and that if they do, they pay for the extra materials directly.

Finally, U.Connect is a cloud-based platform with API integrations, so it fits into nearly any tech system and integrates with both the financial service company's existing tech platforms and its partner organizations'. Our dedicated team was there to support implementation, usage, and fulfillment, and the world-class data security and privacy practices—including HiTrust certification, SOC 2 compliance, and more—gave every user peace of mind that customer information would remain fully secure, from production to distribution and beyond.

In short, U.Connect allowed the financial services company to provide its partner organizations with proven campaign structures, making it easy for them to customize assets and execute their own branded direct mail and email campaigns, adding their specific logos, colors, and contact information while still maintaining the globally approved campaign structure, regulatory compliance, and best practices.



Results

OneTouchPoint's platform and support have significantly increased the financial service company's capacity to execute retention and acquisition marketing strategies at the hyperlocal level without jeopardizing brand integrity.

OneTouchPoint now manages hundreds of monthly direct mail, e-mail, and social media campaigns for their local partners in the financial services company's distributed partner network. With OneTouchPoint's solution, 20,000+ users now act as an extension of the client's marketing team, executing more than 100 localized campaigns weekly. Combining individual campaigns into scheduled production and campaign launch timelines, clients can now roll out brand-approved campaigns within one week of inception, all while maintaining full brand and legal compliance.

Upon completion of each campaign, OneTouchPoint's robust reporting and report integration provides our client immediate access to all activity associated with individual campaigns. In other words, the financial services company now has access to world-class local marketing support through every single partner organization.

Consumers are absorbing information in more ways than ever, through the mail box, their computers, on their phones, and social media. OneTouchPoint's U.Connect platform allows brands to be where their customers are at any given time.

33% The average revenue increase attributed to always presenting the brand consistently.

100+

partner users and counting

20K+

localized campaigns per week

Find out why more than 3,000 innovators in manufacturing, franchise, retail, healthcare, and financial services choose OneTouchPoint for branded customer engagement and supply chain management.

Contact OneTouchPoint Today

Visit 1touchpoint.com or email info@1touchpoint.com.