### Case Study
# Investment Firm

🏢 Large Financial Services Company

## Business challenges and strategy:

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 hyper-local 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 also 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.

### KEY OBJECTIVES:

→ 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

### AS A SOLUTIONS PARTNER:

Annual support numbers

**Partner Users**
**100+**

**Localized Campaigns Per Week**
**20K+**

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.

**OneTouchPoint**

## Strategy, Goals and Results

OneTouchPoint's U.Connect is a through channel marketing technology platform that was designed with exactly this use case in mind. As a repository for pre-approved digital and print assets with customization opportunities for local marketers, OneTouchPoint enables distributed and multi-location 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.

OneTouchPoint's U.Connect platform and client support have significantly increased the financial service company's capacity to execute retention and acquisition marketing strategies at the hyper-local level without jeopardizing brand integrity.

### SHORT-TERM GOALS:

→ Brand governance; ensure brand integrity across locations

→ Customizable campaigns for partner organizations

→ Create national marketing reach with a local touch

→ Reduce complex vendor management with a single source provider

→ Maintain stringent quality and compliance standards

### LONG-TERM GOALS:

→ Simplify campaign execution and effectiveness

→ Flexible distribution channels

→ Monitor inventory & costs to ensure partner organization remain in budget

OneTouchPoint now manages hundreds of monthly direct mail, email, 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 including SOC 2 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.

## ⟲⇢ Technology Solutions Implemented

→ U.Connect TCMA Platform capabilities leveraged:
  • Local marketing campaigns
  • Rights management | user access controls at dealer level
  • Fully integrated print, order management, fulfillment and mailing services

→ U.Connect Digital Asset Module
  • Single source of truth for assets / campaigns

→ U.Connect integrated IT system for inventory and order management

→ Print Services
  • Variable print
  • Digital-on-demand
  • Direct Mail

→ Marketing Services
  • Campaign management services
  • Email

→ Order Management & Fulfillment
  • Fulfillment

**OneTouchPoint**