

Case Study

Large Financial Services Company Empowers Partner Organizations with OneTouchPoint Solutions

Financial Services

Overview.

A prominent financial services company, facing challenges in enabling its nationwide partner network to effectively promote products and services, turned to OneTouchPoint for a comprehensive marketing solution. By leveraging the OTP One platform, the company achieved streamlined local marketing, ensured brand integrity, and met strict regulatory compliance requirements.

The results? Over 20,000 customizable campaigns executed weekly by local partners without sacrificing quality, consistency, or security.

20,000+ localized campaigns executed weekly.



About the Organization.

The financial services landscape thrives on building trust and maintaining relationships across diverse customer bases. For one large financial institution, this meant working through a distributed network of partners to promote its products and services.

However, while these partnerships created an opportunity to expand their reach, they also introduced inherent challenges. Without the right tools, enabling partners to create quality local marketing campaigns would remain slow, inefficient, and inconsistent. Seeking to increase efficiency, maintain compliance, and empower partner organizations, this financial company partnered with OneTouchPoint to implement an innovative solution.

Current Results.

- ✓ 20,000+ Campaigns Executed Weekly
- ✓ Enhanced Brand Consistency
- ✓ Streamlined Workflow & Time Savings
- ✓ Empowered Partners

Business Challenges.

This financial services company relied heavily on its extensive partner network to facilitate customer acquisition and retention efforts. However, empowering local partners to create effective marketing campaigns presented several key challenges:

Key Pain Points:

- ✓ **Time and Resource Limitations:** Local partners often lacked the marketing expertise, creative resources, or time to produce localized campaigns.
- ✓ **Brand Control:** Ensuring brand consistency across all campaigns was paramount, especially for protecting design, messaging, and compliance with strict industry regulations.
- ✓ **Legal and Regulatory Concerns:** The financial industry's strict compliance requirements posed a challenge for non-specialized partners unfamiliar with specific legal terminology.
- ✓ **Data Privacy and Security:** With sensitive customer data at stake, protecting user and partner privacy was a non-negotiable priority.

To address these issues, the financial organization needed a centralized, scalable solution that gave local partners the tools to execute impactful campaigns while maintaining corporate control and ensuring compliance.

Strategy & Solutions.

To resolve these challenges, the financial institution partnered with OneTouchPoint to implement the OTP One platform. Designed specifically for distributed and multi-location businesses, this platform ensured that corporate goals were met while empowering local partners with the marketing tools they needed.

- ✓ **Local Marketing Campaigns:** Local partners were enabled to access pre-approved assets and create hyper-local campaigns without requiring complex design expertise. This streamlined process accelerated production and eliminated bottlenecks.
- ✓ **Integrated Print and Fulfillment:** OneTouchPoint provided fully integrated print services, enabling on-demand variable printing and direct mailing to complement digital efforts.



Key Pain Points.

- ✓ Overwhelming Requests
- ✓ Brand Consistency & Compliance Challenges
- ✓ Limited Reporting
- ✓ Data Security & Privacy



Solutions Implemented.

- ✓ OTP One Platform
 - Brand Module
 - Create Module
 - Engage Module
 - Extend Module
 - Intelligence Module
- ✓ Print Services
- ✓ Order Management & Fulfillment

- ✓ **Brand and Compliance Governance:** Centralized control over messaging, design elements, and legal/regulatory language ensured every campaign met corporate standards.

User-level access controls restricted modifications, protecting against brand mismatches while allowing partners flexibility where needed.

- ✓ **Data Security and Privacy:** OTP and their solutions have a strong commitment to robust security measures, ensuring compliance with industry regulations (including SOC 2) and safeguarding sensitive user data.
- ✓ **Tactical Reporting and Insights:** Comprehensive reports were provided for all campaigns, equipping the financial institution with insight into partner engagement and campaign performance.
- ✓ **Support in Numbers:** Over **20,000 localized campaigns** per week executed through the platform.

A network of **100+ partner organizations** actively using OneTouchPoint's services

Results to Date.

By partnering with OneTouchPoint, the financial services company saw transformational changes:

- ✓ **Efficiency Gains:** Campaigns could now be rolled out within a single week of inception, drastically reducing time-to-market.
- ✓ **Brand Integrity:** All localized campaigns adhered to corporate branding and compliance standards, ensuring a unified brand presence across regions.
- ✓ **Empowered Partners:** Through OTP One, partner organizations independently managed campaigns while accessing the tools needed to meet local audience needs effectively.
- ✓ **High-Volume Campaigns:** Over 20,000 campaigns were executed each week, combining print, email, and social campaigns tailored for localized audiences.
- ✓ **Data Compliance:** Advanced security features safeguarded data privacy for both the financial institution's customers and its partners' clients.

Positive Business Impact.

Through its partnership with OneTouchPoint, this financial institution effectively transformed its distributed partner network into a dynamic and efficient marketing machine. The OTP One platform offered seamless control, empowering local organizations while reducing the burden on corporate marketing teams.

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