



CASE STUDY: DIGITAL

How a Multinational Financial Services Firm is Improving CX



CHALLENGES

A multinational financial services firm wanted to improve the customer experience (CX) across the journey from acquisition to onboarding to use to renewal.

Having partnered with Fusion on various strategic initiatives for years, the company tapped Fusion for help. Fusion's mandate centered around **customer acquisition through email marketing process improvement**. In order to support a considerable number of new products being introduced, the client needed to scale and target their acquisition email processes more effectively.

IMPACT



Interviews and research uncovered pain points and impediments to success



Roadmap of steps to greater efficiency and improved CX



Process opened communications between siloed groups



Removal of barriers to increase speed to market

IN A NUTSHELL

If you want to improve your company's customer experience, start by taking a comprehensive look at your internal processes and obstacles to agility.

A high-profile, global financial services firm intent on providing a more engaging customer experience asked Fusion for help in the area of internal email marketing.

Working together, we:

- *Identified complexities in process*
- *Revealed numerous areas needing improvement*
- *Yielded an actionable roadmap of recommendations, prioritized by those that will make an immediate, noticeable impact*

Continue reading to learn how we addressed the challenge.

THE STORY BEHIND THE SOLUTION

The Fusion team began the initiative by conducting extensive interviews with stakeholders across the internal email marketing process, from inception to creation, review, platform and delivery workflow through Salesforce.

We wanted a clear and accurate understanding of:

- The company's strategy around how to engage customers
- The role of marketing automation
- The existing platforms and how well they support the engagement the client wants to have with their customers
- Current processes, glitches and challenges



We additionally poured through internal documents and platform specifications. Together with our client, we used all this information to identify patterns and needs. We then walked through the process, mapping the systems and procedures to visualize areas of opportunity.



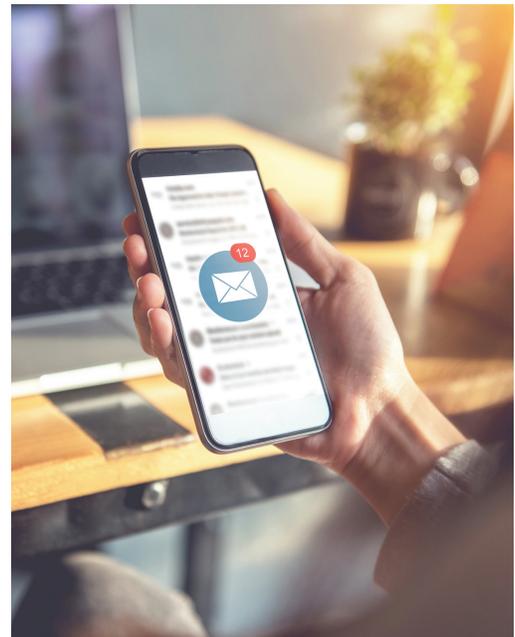
Our assessment revealed that it took much more time than expected to send a marketing email. Collateral had to be created, reviewed and approved by numerous departments, passed on to other departments, and then given a last review by marketing and a final department.



With an accurate picture of the current state, we collaborated with the client to deliver re-envisioned workflows and provided a roadmap of **actionable recommendations**. These fell into three categories: design and content, process and capabilities, and collaboration and governance.

Fusion provided further value in the form of recommendations that went beyond the tactical execution of campaigns. Many suggestions focused on renovating internal processes – how the client gets things done, collaborates, strategizes and engages the customer. **We also defined a need for standardized, reusable email formats, integration or reduction of systems, implementation of marketing automation to create efficiencies, and more collaboration across siloed teams.**

Armed with a vivid **current-state assessment and a viable roadmap**, our client can act upon the prioritized recommendations at their own pace to **dramatically improve both efficiency and customer experience.**



ABOUT THE CLIENT

This company is a financial services corporation that operates a brokerage fund, manages mutual funds, provides investment advice, and wealth management and retirement services. It also offers life insurance and other products and services.

Fusion Alliance



Fusion Alliance delivers actionable insights, customer experiences and human-driven technologies that transform the way our clients envision and shape their businesses.

That's why businesses across multiple industries have relied on Fusion's expertise and partnership for over 25 years. Fusion Alliance is the catalyst that moves your ideas to execution.

LEARN MORE



Laura Rice
Business Development Manager
lrice@fusionalliance.com



www.fusionalliance.com