



## CASE STUDY

# Direct Mail - Working as a Team

“Client art-cost was significantly lowered due to the restructuring of the art and approval process. This was derived from better organization and a reduction in the number of proofs needed before approval.”

An international financial Institution, was looking to improve the efficiency and capture-rate of their Credit Card conversion program. Recent moves to Chip Card technology, in addition to traditional efforts to attract new customers, drove the desire to upgrade their existing process of approaching clients and new prospects.

### CHALLENGE

A more reliable and less complex process was needed, one that addressed all aspects of the program. Our client was working simultaneously with dozens of banks and credit unions, each with their own conversion schedule.

Each had several custom direct mail pieces, email templates, and website layouts that were in various stages of proofing and approval.

Coordinating the communication of all that work had become problematic and was hindering their conversion effort goals. Managing the postage for the subsequent Mail Campaigns was also a concern.

### SOLUTION EMPLOYED

The first priority to organize the various elements of the program and agree to a best-scenario outcome for each.

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*“A strong, unified Client-Federal team relationship was formed, streamlining communication and workflow.”*

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From there we developed an integrated approach that:

- Assigned Federal Project Managers as the communication hub, coordinating activity for the various banks under the program
- Reviewed every mail piece that was being used with the client to revise and standardize the templates for each type of their creative pieces.
- Analyzed the delivery and coordination of artwork from the many banks and credit unions with which the client was working with.

- Reviewed and improved the data-file structures in use. Modifying how and when the data became available.
- Implemented a process to provide data hygiene for the bank and credit union data being supplied
- Worked with the client and PBPS, putting a unique CAPS-type postage account into place that would interface better with their existing PO system
- Introduced a new tracking system that was developed and implemented for use by the banks and credit unions, providing a clear summation of where each and every bank was in their conversion journey, and tracked all proofs, approvals, production costs, and even postage.
- Most importantly, we discussed best-practice ideas for coordinating communication. Twice-a-week sync-up meetings were implemented as part of the solution.

## RESULTS

Client art-cost was significantly lowered due to the restructuring of the art and approval process. This was derived from better organization and a reduction in the number of proofs

Additionally, the new postage account structure implemented virtually eliminated the delays previously incurred while waiting for postage numbers to request funds. A strong, unified Client-Federal team relationship was formed, streamlining communication and workflow.



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