

Marketing

CASE
STUDY

Enterprise Marketing Operations Management Transformation

Implementing Lean Marketing Process Improvement

Situation – How to improve marketing operations efficiency while cutting cost

For two decades, the marketing operations group performed at best-in-class levels of efficiency and effectiveness. Now markets were changing. New competitors were emerging. Mass-market campaigns were less effective. Customers favored new channels and media formats. The business lines required more campaigns, targeting narrower market segments—in less time. Campaign complexity increased. A hiring freeze was on. Marketing operations had to adopt lean marketing management and become more flexible. To achieve the needed gain in knowledge worker productivity, business process standardization turned marketing operations into a “Knowledge Work Factory.”

Client Description, Project Scope, Objectives

Management selected The Lab to rapidly implement improvements. The goal: achieve breakthrough lean marketing operations management efficiency gains and increase productivity within 6 months. The Lab’s lean marketing operations management process improvement templates made it possible. They delivered factory-style standardization discipline to boost operational efficiency. Campaign volume grew 20 percent. Cycle time decreased 25 percent. Staffing remained stable. No technology was required.

The bank is a \$750 billion financial services provider. It is active in the Commercial Banking, Asset Management and Trust markets throughout North America and the U.K. The marketing group supports 18 business units with over 90,000 employees.

The marketing transformation began with a 6-week, Phase I analysis. It documented the efforts of 450 marketing employees, generating roughly 1,200 campaigns annually. Activity-level business process maps pinpointed lean operations improvements, best practices and “virtuous waste” that could be eliminated. Phase I delivered a self-funding, guaranteed business case and work plan to launch the Phase II implementation.

Lean Marketing Operations Transformation Examples

The Lab implemented nearly 300 non-technology lean marketing operations process improvements. Examples:

Upgraded Lean Marketing Operations Management Reports—Hundreds of reports lacked data to quantitatively measure marketing operations performance or define marketing objectives. Campaign status was reported on “stoplight” charts with colors: red, yellow or green. During month 1 of Phase II implementation, The Lab redesigned reports to provide hard data for lean marketing productivity, service, quality and cost.

Eliminated Avoidable Marketing Campaign Reviews—Without effective submission guidelines, risk-averse employees submitted changes for review whenever doubt arose. In practice, doubt arose constantly. Forty percent of legal and regulatory compliance reviews were avoidable and eliminated during transformation.

Reorganized Campaign Templates—Marketing operations management proudly maintained a database of campaign templates to increase productivity and simplify the marketing process. But the database was disorganized. It was faster to create a new campaign than locate a template. The Lab established lean principles and guidelines to categorize, name and streamline templates.

Top 10 Super Regional Bank

Marketing Operations

United States and United Kingdom

Project Sponsor:

Chief Marketing Officer

Non-technology, self-funding operational improvement implementation:

- No new technology
- End-to-end marketing improvement
- 6-month implementation

Project Objectives:

- Campaign cycle time reduction
- Improved service levels
- Increased operating agility
- Marketing efficiency gains
- Cost cutting progress

Project Scope:

- All marketing operations
- 450 marketing employees
- Integrated campaigns
- National campaigns
- Digital marketing
- 12 locations, U.S. & U.K.
- 18 business lines

Implementation Results:

- Campaign cycle time ↓ 25%
- Capacity improvement ↑ 25%
- Campaign volume ↑ 20%
- Annual savings \$13.5M
- Break even point 6 mos.
- ROI (12 month) 6X

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