

# Slice reporting by campaign, channel and customer

Global multi-channel marketing strategy

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# Slice reporting by campaign, channel and customer segments

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## Challenge

HSBC stored its data in one large spreadsheet formed by merging several smaller spreadsheets together.

This 328-column document was time consuming to maintain and challenging to use, with non-technical users tending to break the data validation and increase the risk of human error. It was also locked, which prevented it from being accessible at all times.

Typically, users would forget to enter the data of their respective campaigns and channels causing their proposed strategy to be misinformed.

- The client wanted to bring together useful insights from the spreadsheet so that they could develop an effective global multi-channel marketing strategy
- They also wished to present accurate information to individual campaign managers to help them build better marketing campaigns in the future
- It was important to be able to do this through a timely, cost-effective process

## Solution

We created an ‘extract, transform and load’ (*ETL*) pipeline that accepts raw data before it is entered into the spreadsheet and inserted into a structured data model.

This could then be enriched by other data sets – opens, clicks and dwell times of past campaigns – to create a holistic view of the current campaign and channel.

Next came a set of exclusion reports to help improve their internal validation processes and continually improve the quality of the incoming data.

We also produced a set of user-friendly dashboards allowing the client to cut and slice their reporting by campaign, channel and customer segments.

## Impact

The resulting efficient, sturdy process now serves to:



**Prevent 'death by Excel'.** In other words, it reduces the time campaign managers spend on data entry and frees them to focus more on strategy



**Reduce human intervention** generating basic insights used to take weeks. Now people can view high quality, enriched information within two hours



**Enable the creation of live dashboards** that are updated every day and can be filtered to allow users to drill into specific reports and extract granular data



**Activate set up of 'nudge' emails,** ensuring consistent and timely delivery of data



**Allow the client to track and monitor the success of email campaigns** and take corrective measures to continually improve them in the future

# Wired to solve problems

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