Platform Optimization

Product Feedback from Marketing Admins

Goals

1. Identify the highest value and highest frequency functionalities used by Marketing Admins

2. Conduct "Done Right" research to evaluate the quality of these high value experiences

3. Utilize research data to inform optimization efforts and roadmap

Where we started – Marketing Admins

> To be successful, I need to make decisions that drive what is most important to our business. The right combination of tools, data and resources would give me so much more visibility than what I have today.

Data-Driven | Creative | Collaborator | Time crunched | Customer-centric

Mortgage | Mortgage Marketing Manager

Mortgage Marketing Myles

Myles, a Mortgage Marketing Manager, stays busy coordinating strategic marketing campaigns that educate customers, nurture relationships and deepen client engagement with his company's products and services.

GOALS

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- **Create & Deploy Marketing**
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- **Support Loan Officers**
  Fielding all custom marketing requests in a timely manner while still delivering quality
- **Scrutinize**
  Establishing, reviewing and evaluating metrics, customer insights, lead sources and ROI

FRUSTRATIONS

- Splitting time between supporting LOs with new material and managing marketing library. Never enough time to do either job well
- Lacking a consolidated and accessible asset library for use in cross-channel marketing campaigns
- Struggling to find time to be strategic rather than reactive
- Needing access to marketing performance reports and analytics

HOW WE CAN HELP

Actionable recommendations
Guidance, supported by metrics, on how to configure marketing efforts for maximum effectiveness

Marketing Templates
Selection of marketing templates including: products, services, relationship-deepening and general communications

Marketing Performance Data
Access to performance analytics and reports for active and historical marketing activities

Testing Capabilities
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Content Library
Customizable library of images, templated journeys, emails, etc

Omnichannel Marketing
Ability to quickly create omnichannel marketing material without needing technical support

Highest Value Tasks

Tasks:

Creation and management of:

1. Email
2. Journeys
3. Campaigns

How we got there:

Examine Pendo Data

Identify the top 10 components/tasks users interact with in our platform

Isolate Highest Frequency Tasks

Deploy a survey to determine the most valuable tasks by user personas

Task Flow Evaluation

Understand the task flow and quality of the highest-frequency user experiences

Findings Summary

Praise & Ratings

Email

- Access setup
- Preview option – especially mobile preview
- Expert Content

★★★☆☆

Campaigns

- Ability for individuals to opt out of campaign builder campaigns
- Flexible
- Preview feature

★★★★☆

Journeys

- Highly customizable
- Drag and drop interaction is easy
- Selection of triggers, actions, triggers and events

★★★☆☆

Feedback Themes

Inefficient Workflow

Designs don't always support efficient work and often create additional work. Users are looking for more streamlining in the product and better performance.

Lack of Visibility

Admins are frustrated by not only by things they can't see from their accounts (they have to log in as LOs to see things) but also by the inability to see the outcomes of their marketing efforts and meaningful reports.

File Management

Navigating files is difficult as the collection of files grows. (One client has over 1000+ images in their library and 109 templates)

Reporting

Reports don't meet users' needs and take too much data extrapolation. Users aren't confident they are interpreting the data correctly and always come up short trying to answer management's questions.

Wendy Wilkus

Brand Specialist – XYZ Company

File management is an ongoing struggle

- *“We have at least 1,000 images – probably more”*
- *“Usually, I can’t find the image I need [because they are not named] so I just re-upload it which is faster than having to search visually.”*
- *"When I delete, just leave me in that same spot, so I can keep scrolling down to see if there's more that I need to delete. Right now, its hard to tell where to pick back up”* (page refreshes following a delete)

Theo Nill

Tech Stack Director – XYZ Company

Lack of Visibility is an ongoing struggle

- *"9 times out of 10, I can't view what's going on [from my admin account] so I have to log into individual loan officer accounts to actually see what is going on at the user level. This extra step takes so much time."*
- Loan officers *want to be included in some campaigns and not others. Its a ton of extra work to remember who wants to be a part of what and it creates a secondary task tracking all of that. LO' s need visibility into what is coming next so they can preview it and opt out if they want to."*
- *"There's no testing environment [for journeys]– I wish there was."*

Bridget Russo

Marketing Strategist – XYZ Company

Reporting is an ongoing struggle

- *What we have today vague and wholly unhelpful*
- *I have to insinuate a lot....just kind of make some educated guesses. I don't always know if [my guesses] are completely accurate*
- *Leadership wants to know all about the **loan volume**, like the **numbers and dollars** attached to our marketing efforts.*

  *We think of it as oh, it got this many clicks, or you know, someone applied like we can kind of see that go through, but [leadership] wants the **exact dollar numbers** – like **revenue information**.*

Email Feedback – Users Want…

What?	Why?
More Efficient Deleting Multi-select delete function in image library	Client has over 1K images and deleting them one at a time is labor intensive
Staying in Place After Deleting a File Elimination of the page refresh and subsequent return to the top of the page immediately following a delete in the image library. Ideally, users would delete something and remain in the same place so they don't have to continually re-navigate to where they just were.	Lots of bouncing back and forth is annoying and continually having to re-navigate to where she was on the page (after deleting something) is irritating. This is particularly punishing when the client has a lot of images.
Image Names Ability to name images in the image library	Locating the right image would be easier. They don't typically delete their images for compliance reasons, so the archive just continues to grow at a rapid, nearly unmanageable pace.
Folders Ability to store images in folders	Locating images would be easier
Editable Zones Editable and locked down "zones" would allow admins to build in flexibility and reduce the one-off requests from LOs. "(i.e Subject line of an email or image would be editable but not the email file name to help with version control)	It's hard to balance an LO's desire for quick customization with a marketing admin's need for brand control. This dynamic relegates some admins to order takers which is very time consuming.

Email Feedback – Users Want…

What?	Why?
A/B Testing Ability to do A/B testing	Opportunity to identify best practices for email layouts based on message performance
Ability to Archive Archive feature to warehouse old messages while still preserving them	Improve file management while keeping old content handy for compliance reasons
Streamlined Approval Process Approval process that allows users to make edits and not have to start over from scratch. Content creators want to see messaging that tells them what to change and let them change it right away without having to re-create any content.	Draft emails currently get deleted during the routing of the approval and content creator has to start over.
Default Footer Single branded default footer on email builder that has the flexibility to add a co-brand	Efficiency
Less Buggy Interactions Bugs resolved to streamline their interaction with our platform	Inconsistent quirks are frustrating and undermine our reputation

Email Feedback – Users Want…

Bugs include

- Icons/thumbnails are inconsistently displayed on the email template overview page
- Buttons disappear when users edit the button text. It needs to be re-added to edit button text.
- Some edits show in preview mode but not in draft editing mode and vice versa.
- Formatting is unpredictable and time consuming to troubleshoot for non-technical marketing admins who don't feel comfortable looking at HTML
- Nesting elements creates unpredictable formatting. Sometimes nesting works and other times it doesn't. MA's have no ability to predict what will work when.
- Often can't reformat an entire paragraph of text. Instead, user reformats a few sentences at a time which is inefficient and frustrating.
- Numbers in a numbered list do not always absorb new font/font color

Journey Feedback – Users Want…

What?	Why?
More Visibility Into the Nuances of Each Journeys A scannable journey overview (duration, touchpoints, on/off ramps) that is automatically generated from scraped data as the journey is being built	It is difficult to identify how one journey differs from the others. Although there is a description field, it requires admins to read each narrative fully to pull the right information. One client has to maintain a separate document as a work around for our lack of context. Admins have to cross-reference this secondary file to figure out which journey to use from our platfrom.
Answers to the Right Journey Questions Tools to allow admins to identify which journeys and touchpoints within in those journeys are most successful in generating business	Leadership wants to know about conversion, loan volume dollars and how they are attributed to a specific journey. Today, admins cannot answer those questions.
Send Window instead of Calculating a Timer Delay Ability to designate a "send-window" (i.e 8am – 5 pm)	This would eliminate the need to do the math of calculating the timer delay each time a send is initiated
Most Recent Loans Only Indicator A check box to include only the most recent loan in journey communications	Borrowers are getting outdated, irrelevant communication about loans that haven't been active in over a decade. This oversight undermines the legitimacy of the sender.
Journey Reach Data on how many people a specific journey has gone to - it appears as zero in the admin view	To see the real number, users must switch into a marketing account which takes time and effort.
Status Indicator Active flags do not show up in admin views and can only be seen by switching into a marketing account	Additional step is time consuming

Journey Feedback – Users Want…

What?	Why?
Unable to Recognize Product Enhancements In-context updates to announce new functionality.	Journey updates are not being recognized because users are not aware of them and unable to keep up with our email announcements or release notes. Admins report having to just stumble across any journey enhancements and often don't take advantage of new updates.
Insight into Journey Effectiveness Analytics for journey performance including unsubscribes, engagement, applications initiated, and how many people completed the journey. They want to be able to track which link in which email was used to take action.	Admins want to identify and learn best practices from the most effective marketing approach.

Campaign Feedback – Users Want…

What?	Why?
Campaign Details from Admin View Ability to see the campaign details from an LOs perspective from within the Marketing Admin view	Lack of big-picture visibility about what LOs are seeing require admins to continually bounce back and forth from the admin view into the LO view.
Flexible Unsubscribe More nuanced unsubscribe functionality that allows clients to stay subscribed to some communications but not others. (i.e. keep sending me rate info but not handy house tips)	Retain as many subscribers as possible and micro-target their interests
Visibility Into Custom Groups (Leads/Contacts > Groups) Ability for marketing admins to see LOs and then drill down into their groups. Admins want access to custom groups.	Supports better, more efficient decision making
Reminders and Ability to Opt Out Proactive messaging to remind LOs every time that the campaign was going send out the next email in the campaign sequence and the ability to preview the message. (i.e. "Do you want to opt out of this the next email in this campaign"?)	Empowers loan officers to curate their communications. Its very common for LOs to want to pick and choose what goes out and currently there is no easy way to monitor what is queued up next and opt out of it.
Accurate sorting When auto campaigns are sorted by "last modified", the results are not fully sorted. Rather, only the mm/dd fields are being sorted and the yyyy field is overlooked.	The lack of a sort is frustrating for clients and makes finding a specific campaigns very difficult in large data sets
Hyperlinked Campaign Names for easier access and save users the hassle of dealing with the drop down. If campaign name can't be linked, change "View Actions" label (in actions drop down) to be called "View Campaign" since that is really what it is.	Hyperlinking campaign names provides easier access and eliminates an extra interaction. Secondarily, renaming "View Actions" to "View Campaign" just makes more sense if hyperlink cannot be implemented.

Revisiting Marketing Myles – Marketing Admins

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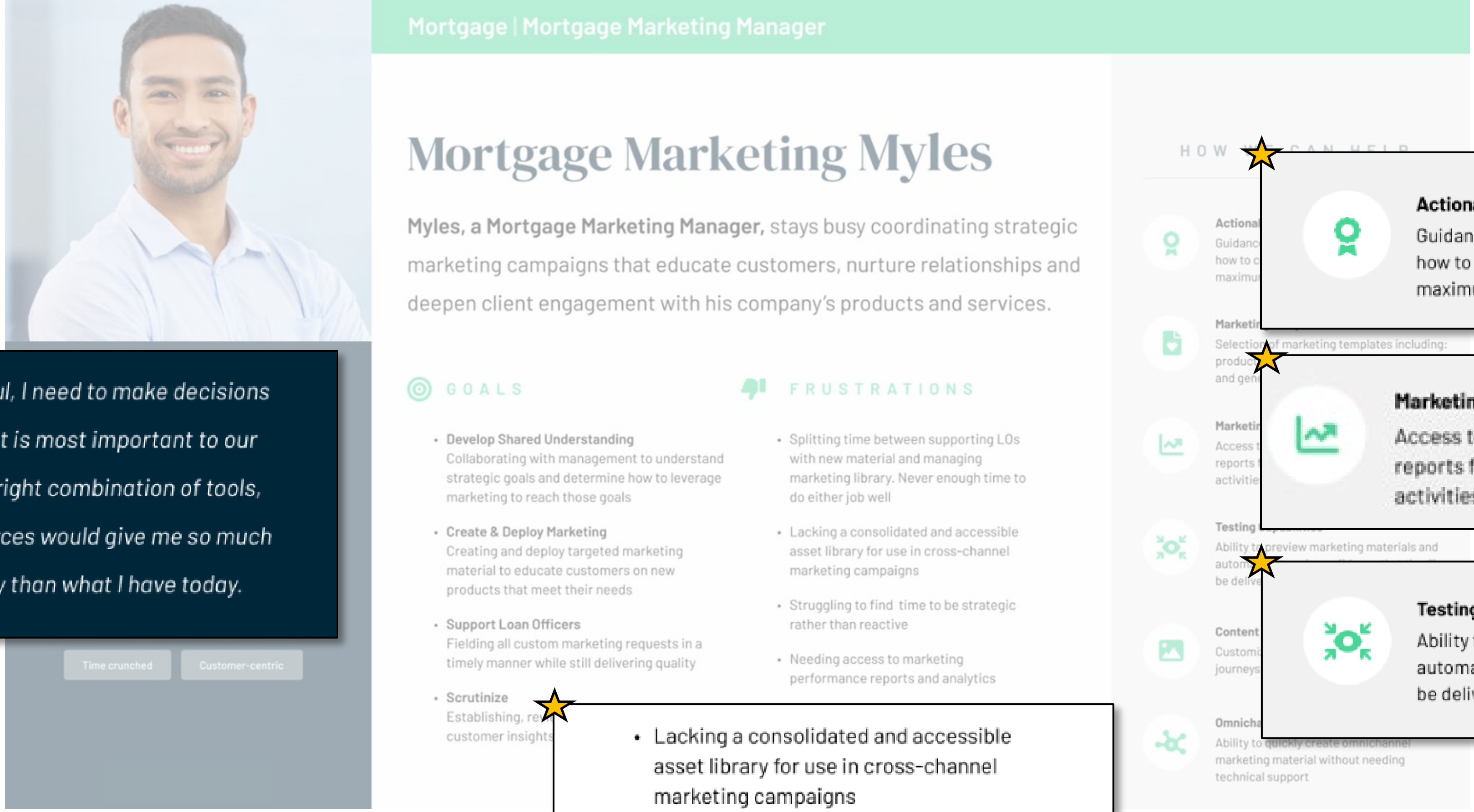
Marketing Admins – Where to Focus



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