Case Study

Transforming Customer Journeys to Increase Engagement

A nationally known financial institution, and longtime client partner, recognized the need to improve their new credit card customer onboarding experience due to decreasing customer engagement and card activation rates.

RPE ORIGIN

Identifying issues and potential barriers

The RPE Origin team began by exploring the client's goals, objectives, and observations related to their customer onboarding journey. What pain points had they identified for their customers? What was working and not working in the existing journey?

Our RPE Origin team investigated the existing onboarding journey, assessed available data sources used in the outreach (as well as other available data), and evaluated current uses of campaign automation. Among the barriers we identified, the flow of data between systems plus shortcomings in the journey's ability to capture and heighten customer interest emerged as key focus areas.

Two key goals for the revitalized program emerged:

1. **The ability to manage additional complexity through automation.**
2. **The need to increase customer attention and interaction.**

Understanding new cardholder's needs

The RPE Origin team conducted in-house research among general population credit card users – plus the client's specific cardholders – using social media and online channels. In addition, the client's recent accountholder focus groups were examined to round out an understanding of audience thoughts, feelings, and needs around the benefit of the card.

We also analyzed email engagement and other available data to develop a deeper understanding of how their customers thought about, evaluated, and engaged with the brand during the highly impressionable weeks between sign-up and regular card usage.

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Shaping a new customer journey

RPE Origin used the insights gathered to reshape the customer journey with the goal of reinforcing behavior change while creating a stronger connection with the brand.

The refreshed creative featured more compelling customer-centric messaging, visual effects, and clean design in both email and direct mail. The new email designs balanced simple and clear calls-to-action with engaging interactive components and animated elements, and the new direct mail pieces delivered a more concise and engaging showcase of brand benefits.

Working with the client's technical team, we integrated data from multiple systems to infuse relevant, personalized information into key points along the journey, created customized audiences, and adjusted timing based on the customer's interaction with the credit card. Through a template-and-automate process, RPE Origin created a continuously running, low-maintenance program for the client.

The remodeled program continues to operate today, and serves as a comprehensive, cross-channel launchpad for related triggered campaigns designed to guide customer behavior.

About RPE Origin

We are the industry's only vendor-agnostic, email-centric agency serving enterprise companies throughout their digital journey. We aim to be an indispensable partner for enterprise and agency clients who rely on email for success. Whether you need help choosing a new ESP, enhancing automated B2C or B2B customer journeys, or connecting data points across your tech stack, we help you move from simple to sophisticated to drive more revenue through email marketing.

Our team lives email every day, and that includes both email marketing and maximizing the connective tissue across all digital channels. With our customized approach and flexible services, we can do everything from one piece of the puzzle to the entire picture.

Need help with your enterprise email strategy and systems?
Contact our team to get the conversation started.

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