

Marketing & Media Campaign Management Utilizing AgileXRM and Microsoft Dynamics CRM

Case Study



Industry: Financial Services / Company Size: 2,500 / Bank Branches: 400

Laboral Kutxa is a Spanish bank with more than 2,500 employees across 400 branches throughout Spain and is headquartered in Arrasate (Mondragon), Gipuzkoa. Its parent company, MONDRAGON Corporation, is the seventh largest business group in Spain and operates in the capital & consumer goods, industrial components, construction, finance, scientific research, and enterprise service industries.

CHALLENGE & OBJECTIVE

Managing marketing and media campaigns in the financial sector has become increasingly important due to unfavorable economic conditions in Spain. Laboral needs to attract more clients as well as deepen relationships with existing clients with marketing campaigns that have lower budgets than ever. Shorter campaign lifecycles, constrained resources; doing more with less.

The Organizational Director wanted to streamline the process for campaign initiation as well as management & measurement across internal and external cross-functional teams in Marketing, Public Relations, Design, and Procurement that are needed to execute campaigns for all 400 branches. Campaign initiation, management, and measurement all involve tasks that are resource dependent, approval dependent, and set against predefined timelines, so any increase in coordination efficiency will increase the likelihood

projects are not finished late. Lastly, management wanted a mechanism in place that would allow running processes to be quickly adapted in the event of date, priority, or sequence of event changes.

MARKETING DELIVERABLES AFFECTED

Print collateral, banners, video, in-branch displays, copywriting, email campaigns, web marketing, website updates, press coverage/releases, and traditional broadcast.

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The fact that there are explicit process models that show the way the marketing campaigns are managed in Laboral Kutxa is already a valuable asset for us, but being able to execute these and incorporate changes and deploy to production at the speed of a click gives an impressive flexibility to respond to new requirements”

ALFONSO YEREGUI
IT Manager

DYNAMIC BPM ENGINE SOLUTION

After evaluating several options, Laboral Kutxa chose AgileXRM that utilizes Microsoft Dynamics CRM plus its xRM platform functionality. Microsoft SharePoint was used as the portal and document repository.

AgileXRM provides a dynamic BPM engine where activities are configured code-free in a Visio-based process modeler that churns out a process model that is an executable application.

PROJECT STATS



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It was not a matter of just defining the processes but to also execute them. It is the people that drive the processes and therefore, the technology should respond to the changing market requirements and be able to adapt to these changes at the speed our business demands it.

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ALFONSO YEREGUI
IT Manager

RESULTING BUSINESS BENEFITS

The solution yielded numerous benefits that ultimately did everything the Organizational Director was after:



A single information/file repository was created for internal/external cross-functional teams that eliminated unnecessary duplicates and provides a single view of the most recent statuses and file versions



Comprehensive and contextual forms that allow users to receive the data they need to complete their activities and that takes away the guess-work of how they should be doing their job or what they should be doing to complete a process



A flexible reporting infrastructure that makes information available to all departments and multiple levels of management – reducing IT costs and complexity



Real-time campaign performance data that allows management to either build upon successful outcomes or to minimize negative impacts of underperforming campaigns by course-correction



Alerts and notifications to ensure processes are not held up by overdue tasks; helping to ensure projects finish on-time

AgileXRM enables Citizen Developers and/or IT to build mission-critical and everyday process applications in a fraction of the time of doing it with other methods and using familiar Microsoft technologies like Dynamics, SharePoint and Visio.

AgileXRM enables transformational process automation in manufacturing, energy, financial, insurance, healthcare and many other types of businesses across the globe.

