

THE POWER OF

Data-Driven Communications:

A blueprint for success

bolger / VISION BEYOND PRINT

Contents

- 1 Defining Data-Driven Communications | 3**
- 2 Rethinking Customer Interaction | 5**
- 3 Where Print Fits In | 7**
- 4 How Data Enables ROI | 9**
- 5 Why build data-driven workflows? | 11**
- 6 A closer look at how successful companies implement workflows | 13**
 - Business Challenges | 15
 - Technology Solutions | 17
 - Results | 19
- 7 Is data-driven communications right for you? | 21**
 - Sample Proposal | 22

1

Defining Data-Driven Communications

Forget everything you know about traditional workflows. It's slow. It's tedious. It's labor intensive. There's a better way.

A SIMPLER, FASTER, & SMARTER WAY TO MANAGE PRINT AND OMNI-CHANNEL COMMUNICATIONS

Data-driven communications is a more streamlined way to communicate and connect with your audience in our omni-channel world.

What is data-driven communication?

Simply put, data-driven communication leverages assets from a variety of different database platforms to deliver timely, responsive, and highly personalized messages across multiple channels. Through automation, you can connect with your audience in a highly-relevant, timely, and personal way.

This is made possible by:

- Bringing various marketing assets and messages into one place
- Leveraging a single customer view
- Enabling user customizations
- Streamlining the creation and delivery workflow

DATA SOURCES ARE EVERYWHERE

The key to saving time and money comes down to information flow. **From one central hub of data**, you can create and execute marketing messages that will engage your audience and drive action across various channels—both digital and print. Bringing together all the various data and marketing assets into one integrated platform enables you to leverage these assets much more effectively than traditional workflows.



2

Rethinking Customer Interaction

Building data-driven communication capabilities are critical. The buyer journey is shifting, especially in the B2B space.

Buyers are now driving the content: engaging with content **WHEN** they want it, **HOW** they want it, and **WHERE** they want it.

The Million Dollar Question: How are you leveraging your data—or helping clients to leverage their data—in order to meet today’s buyers where they are?

2x

Companies need to leverage data. A recent McKinseyⁱ study showed that brands who effectively deliver highly personalized content—across multiple channels *including* print—to meet this buyer journey are up to **two times more successful** than companies that do not.

91%

Another study from Accentureⁱⁱ shows that 91% of consumers are more likely to **shop with brands who recognize, remember, and provide relevant offers and recommendations**. Leveraging data-driven communications enables the creation and delivery of this content.

94%

94% of marketersⁱⁱⁱ say that **personalization is very important** or extremely important for meeting marketing objectives.



Personalization



Omni-Channel
Marketing



Experimental
Marketing



Many Choices



User
Engagement



Multiple
Touchpoints

3

Where Print Fits In

Print works. Print works *better* when it's part of a multi-channel campaign that leverages data and is integrated in data-driven ecosystem.

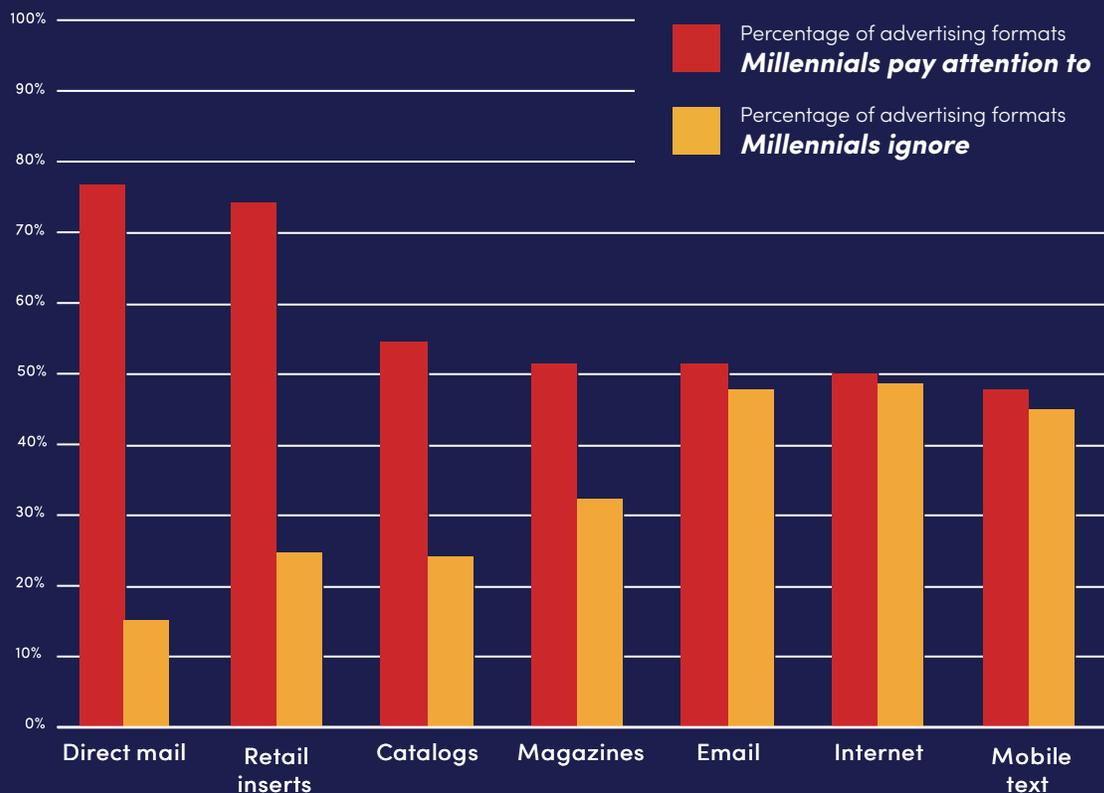
From a neurological perspective^{iv}, print communication is more engaging and more memorable when compared to digital marketing. Consumers spend more time with print communication, they have greater recall, and overall see an item as more valuable when delivered in print.

62% A recent study^v of what formats millennials pay attention to shows that print out performs digital in capturing and holding attention. Average **response rates** to multi-channel campaigns increase 62% when integrating direct mail.

70% This number goes up to 70% when using oversized or dimensional mail with **highly personalized content**.

PRINT vs. DIGITAL MARKETING

Performance rate of advertising formats in capturing and holding Millennials attention



Source: Millennials: An Emerging Consumer Powerhouse.

4

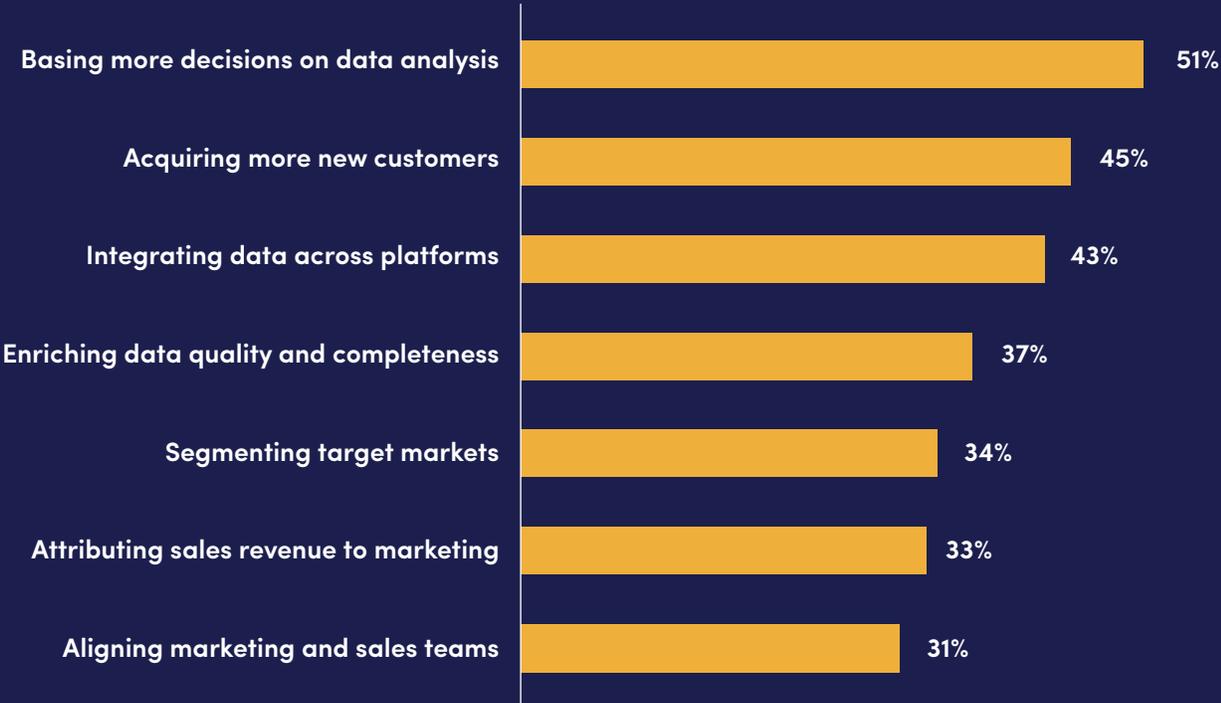
How Data Enables ROI



Buyers, marketers (and bosses) have high expectations today. Only data-driven communication enables full execution on these targets. Marketers can **drive up ROI when using data** to drive triggered responses because data helps enable trackable results. Pulling all of this off is not a simple task; however, it becomes simpler with good technology and clear strategy.

MOST IMPORTANT DATA-DRIVEN MARKETING OBJECTIVES

Published on MarketingCharts.com July 2017



Data Source: Ascend2 and Research Partners

Based on a survey of 284 marketing influencers, 76% from companies with at least 50 employees and 76% also from B2B (40%) or B2C (26%) companies

Q: "What are the most important OBJECTIVES for data-driven marketing to achieve?"

5

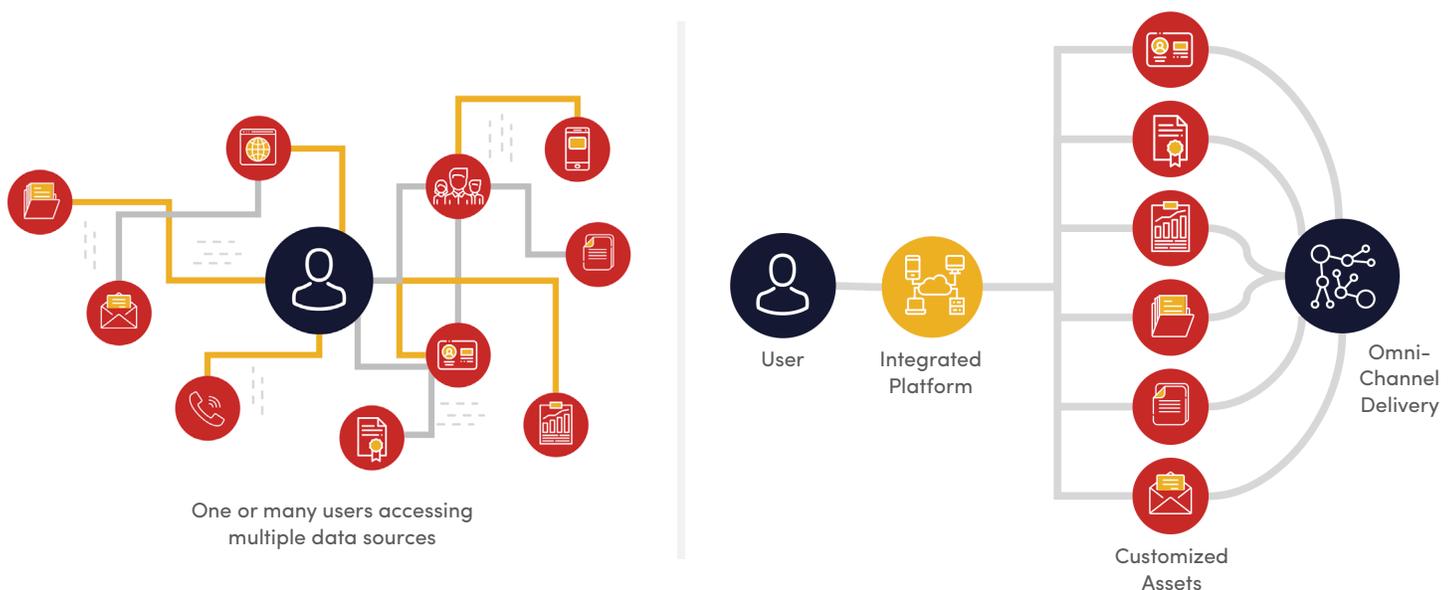
Why Build Data-Driven Workflows

When done properly, a data-driven communication workflow will take a complex situation in which a single user must access multiple data sources and cobble it together into a manual workflow—and transform it into an integrated platform that enables multiple users to execute a unified data-driven communication strategy across all channels.

Benefits of Data-Driven Workflows

- Integrating print allows you to drive engagement that's aligned with your digital strategy.
- Print drives engagement rates up nearly 70%.
- Using data-based triggers enables faster response to buyer actions and desire for information, and can help nurture them through the buyer journey much faster.
- Key assets can be shared with call centers for more effective follow up.
- Data integrity can be vastly improved by reducing the number of systems that need updating or revision controls.
- Digital workflows gives time back to marketers so they can focus on strategy rather than delivery.

SIMPLIFY AND STREAMLINE





6

A closer look at how successful companies implement workflows

A CASE STUDY

CUSTOMER PROFILE:

National Health Insurance Provider

They have a rapid growth trajectory, supporting thousands of plans, multiple states, and a large network of hospitals and doctors.

There are a large variety of personalized materials needed to satisfy all areas of their business. At the start, they had a dedicated team of 12 marketers focused on developing and deploying annual plan documents. This was a complex process that required multiple versions and personalization for each member. As a result, the marketing team was very delivery focused. More attention was spent on executing materials rather than implementing marketing strategies to grow the business.

While this case study focuses on an insurance provider, this profile is very similar to a variety of industries. We are all under pressure to produce personalized materials to support and grow our businesses. The technology tools and data triggered workflows have an application for a variety of industries.



Rapid Growth

- Thousands of plans
- Multiple states
- Large network of hospitals & doctors



Dedicated Teams

- 12 dedicated marketers
- Create & deploy highly versioned client materials

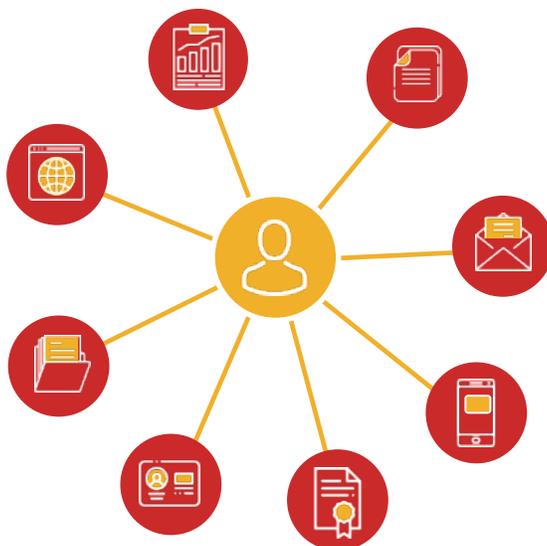


Delivery Focused

- Attention on execution rather than strategy

BUSINESS CHALLENGES:**Highly customized workflow**

This customer delivers over 50,000 personalized assets each month, which total over 6 million variable pages. Some assets are required by regulatory compliance, such as Explanation of Benefits, ID cards, Welcome Kits, etc. while others are focused on acquiring new business or educating current membership. Each of these assets need to be delivered over a variety of channels, both print and digital in format.

**Omni-Channel Delivery**

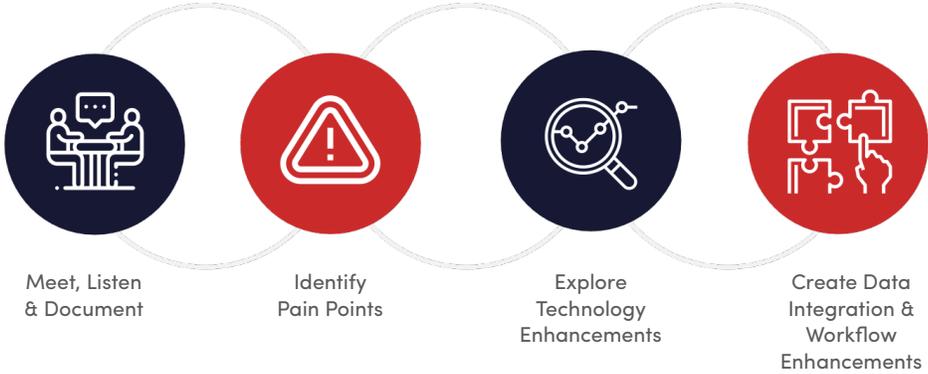
Those highly customized assets have a variety of different output channels. Assets are needed for online tools, such as portals for brokers or members and are also delivered in email blasts, to call centers, and mobile applications for member use.



TECHNOLOGY SOLUTION:

Discovery Session

At the start of the process, our technology team at Bolger conducts a customized discovery session. In that session, we spend time getting to understand the client’s processes. We identify the list of pain points and explore technology solutions in a consultative approach. We demo similar technologies and make suggestions on potential process improvements. Once we agree on what would work best, we create plan for the technology solution, and help the customer develop an ROI to track improvements.



THE HEART OF THE SOLUTION:

A Centralized Asset Database

For this insurance client, critical client data was spread across many platforms, templates, and formats. By integrating the data into a single platform, all assets could be stored in a single location and be linked out. This storage solution eliminates managing versions and updates to logos, templates, and the like—guaranteeing that every document and deliverable has the most up-to-date content.



The tool also has a great change control system built in which allows users to track edits for QA and compliance purposes.

Creating this universal tool became a great way to streamline client onboarding. During their discovery process, they only need to gather client assets and enter them into this system, which will then integrate to all other required areas.

THE HEART OF THE SOLUTION:

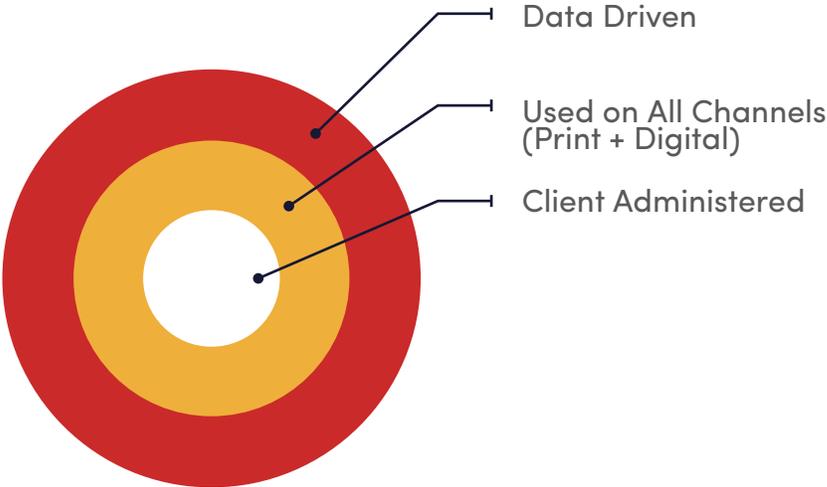
API Integrations

API integrations are a key part of the success of this program. In order to push data in an automated fashion between different programs and systems, we leverage APIs. This allows for seamless integration of assets across systems and omni-channel methods.



Rules Engine

The detailed rules engine triggers events based on data point and can generate content on demand. Knowing your customer’s data and being able to trigger actions based upon it is a key piece of any technology solution.



THE HEART OF THE SOLUTION:

Smart Templates

Designing smart templates to maximize the use of your data is an important step in the technology tool. During this process, we redesign the templates to increase the number of variable areas and rule-based triggers. The increased flexibility in templates reduced the need for multiple versions, which is key to scaling and onboarding faster.

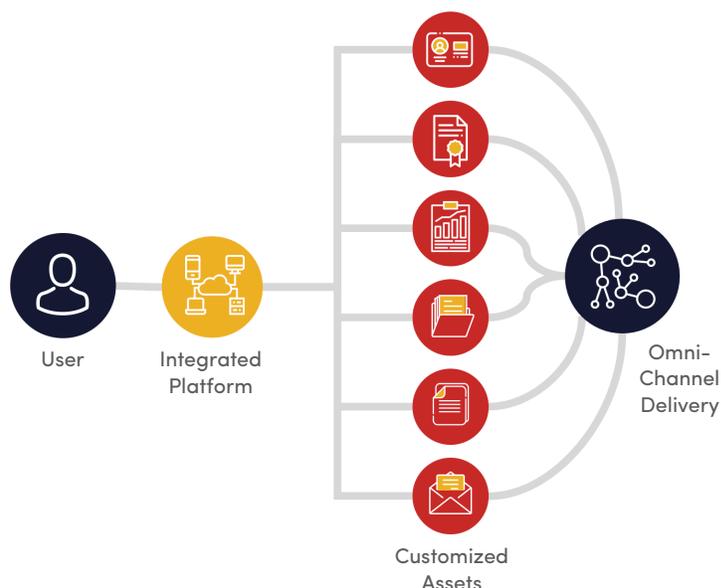


RESULTS:

Workflow Comparison

Before the data-driven workflow system was implemented, one or more users interfaced with multiple systems. The manual workflow required multiple edits and was much harder to manage.

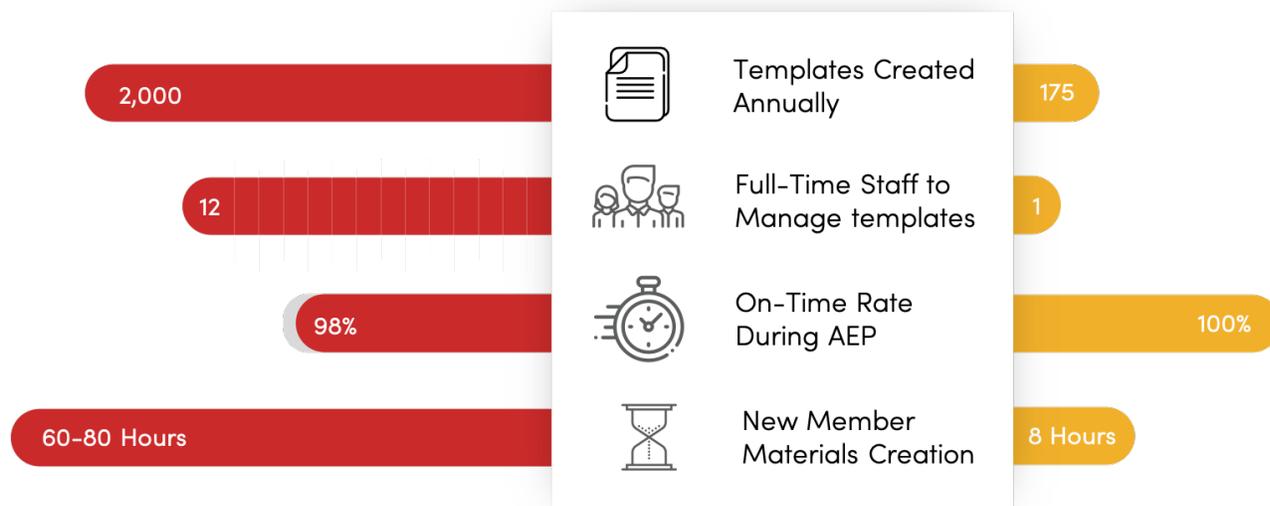
After implementing the workflow, one user interfaces with one system. That system automatically pushes updates out to all related systems and channels.



RESULTS:

Before & After Comparison

Data-driven communication goes well beyond variable data printing and marketing. It's all about driving marketing ROI through improved response times, conversions, and significant efficiency gains. It's about connecting with your audience in a timely, highly-personalized, and relevant manner. And finally, It's about getting your buyer relevant information when they want, how they want it, and where they want it.



-  **Omni-Channel**
No integration or systematic updates
-  **Documents**
Unique to each customer
-  **Customization & Personalization**
Complex & limited to larger customers
-  **Marketing & Creative Employees**
Consumed by versioning materials

-  **Omni-Channel**
APIs integrate systems to all documents for systematic updates
-  **Documents**
Standard library for all customers
-  **Customization & Personalization**
Offered to all clients
-  **Marketing & Creative Employees**
Free to create campaigns & acquire members

Is data-driven communications right for you?

- Multiple marketing assets that need to be versioned/managed
- Multiple delivery channels, both digital and print
- Multiple people that touch/revise assets
- Outside sales/team members that need to access inventory
- Inability to scale without hiring additional marketing staff to manage documents.
- Physical printed asset storage that needs to be updated on a regular basis

Use our sample proposal – found on page 22 – to share how data-driven communications can support your business growth.

Examples where data-driven communication can be used

- Member communications
- Direct Mail response to digital marketing
- Customer acquisition and retention
- Compliance and regulatory communication
- Award program promotions and mailers
- Healthcare plan documents and notices
- Broker communications
- Product sample kits
- Student recruitment and retention
- Planned giving campaigns
- Retail catalogs
- Real Estate marketing
- Various promotions and offers

ⁱ McKinsey: <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/the-end-of-shoppings-boundaries-omnichannel-personalization>

ⁱⁱ Accenture: <https://newsroom.accenture.com/news/widening-gap-between-consumer-expectations-and-reality-in-personalization-signals-warning-for-brands-accenture-interactive-research-finds.htm#:~:text=According%20to%20the%202018%20Personalization,with%20relevant%20offers%20and%20recommendations.>

ⁱⁱⁱ Epsilon: <https://www.epsilon.com/us/about-us/pressroom/marketers-disclose-personalization-opportunities-and-challenges-new-study?redirect=cnvr>

^{iv} Neuroscience Marketing: <https://www.neurosciencemarketing.com/blog/articles/print-vs-digital.htm>

^v Quad: <https://www.quad.com/resources/documents/customer-focus-study-millennials-an-emerging-consumer-powerhouse/>

<Place the content below on your group's letterhead>

Month XX, 2021

Name of Recipient
Business Name
Street Address
City, ST XXXXX

BOLGER WEBSITE LINKS TO:
<http://bolger.wpengine.com/>

HEALTHPARTNERS CASE STUDY LINKS TO:
<http://bolger.wpengine.com/#>

Dear Name of Recipient:

Our communications workflow is complex. We manage multiple communications channels, customers, and data points. This is a significant cost on personnel and infrastructure. As our customer base grows, this problem only increases.

Therefore, as an organization we need to invest in **data-driven communications**. This will simplify our workflow while still delivering customized, omni-channel communications that will enable our business to grow.

I propose we start the process of bringing technology into our workflow with Bolger. They are proven to be a trusted partner, with over 1 million users of their technology platform. Here's a [link to a case study](#) that shows how HealthPartners was able to reduce costs by 50%.

BENEFITS OF SMARTQ™

- Seamlessly integrates with our systems through APIs
- Cut wasted printing with Smart Templates that update instantly
- We can generate content on-demand with a rules engine
- Reduce the staff hours needed to manage communications
- Quickly onboard new customers with personalized content

To get started, I would like to set up a call to understand how Bolger's SmartQ™ technology can help our organization cut costs.

Sincerely,

Your Name
Title
Phone