

CDP Rollout Planning for Banking Client

Use case development, organizational alignment, and ROI forecasting for pilot CDP deployment

The Challenge

A large consumer bank was undertaking a rollout of a CDP across their enterprise. Their structure was heavily siloed between marketing and technology, which impeded data deployment. Additionally, C-level executives were concerned the costs and organizational friction of CDP rollout versus the potential returns on investment

Solution

- Actable audited marketing practices and data infrastructure in partnership with the CDP provider to create an advanced data design that would be immediately useful for marketing programs with limited IT resource requirement
- Actable created a customized playbook for a newly formed center of excellence that allowed for explicit one-to-one marketing techniques to be introduced into existing marketing initiatives
- Actable developed a rank-order of use cases for rollout, with predicted ROI

Results

- Executive team green-lighted CDP rollout and investment
- Phased adoption plan of CDP successfully rolled out with COE with support from IT, Analytics, and Marketing teams
- Initiative is ongoing, with deployment workshops, data model enhancements, and cross-functional initiatives

The Promise of Marketing with a CDP

