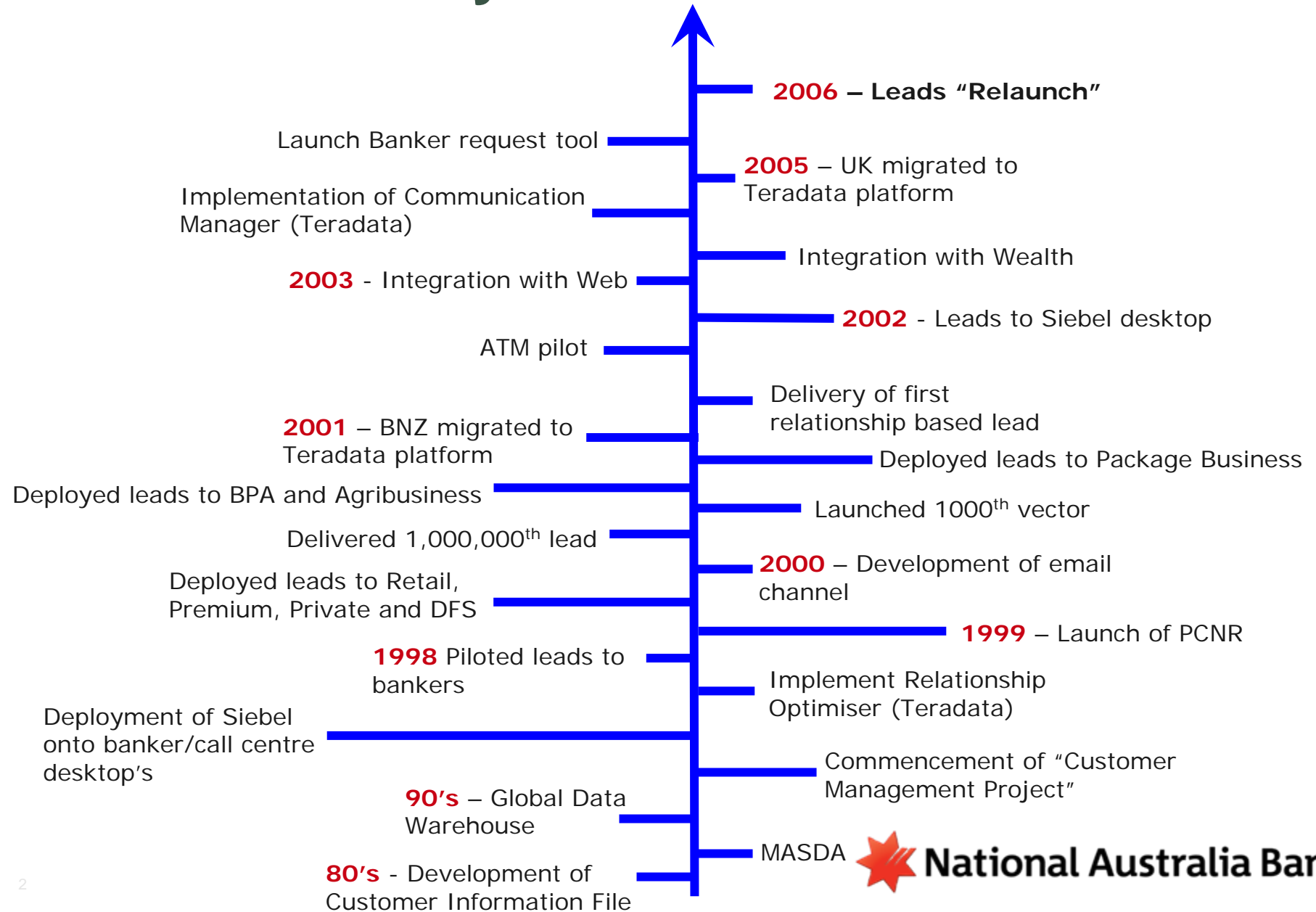


# Making Sure Your Insight Is Insightful: Analytical Marketing at NAB

Antony Ugoni  
August 2008



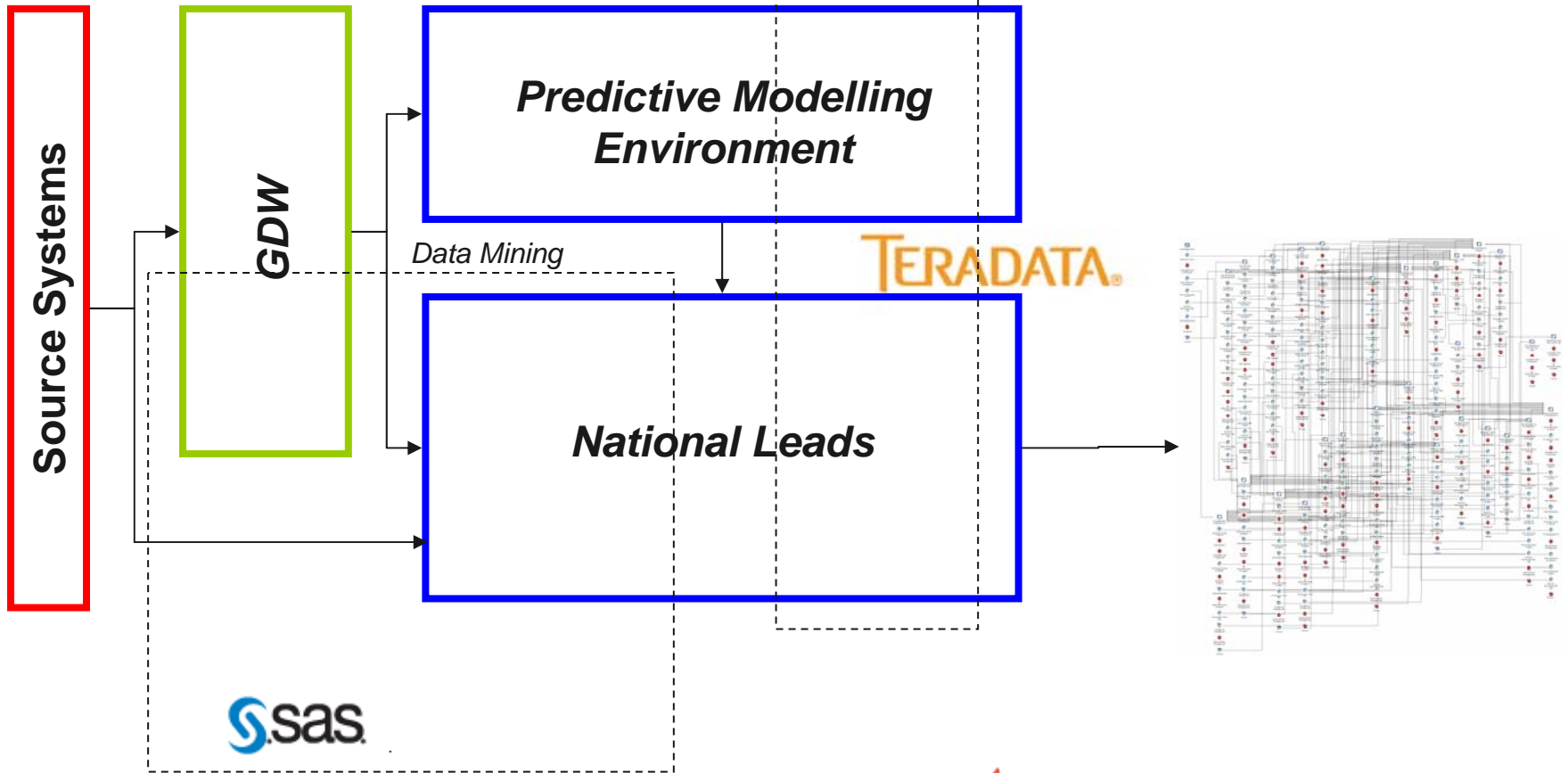
# CRM Journey



# Architecture



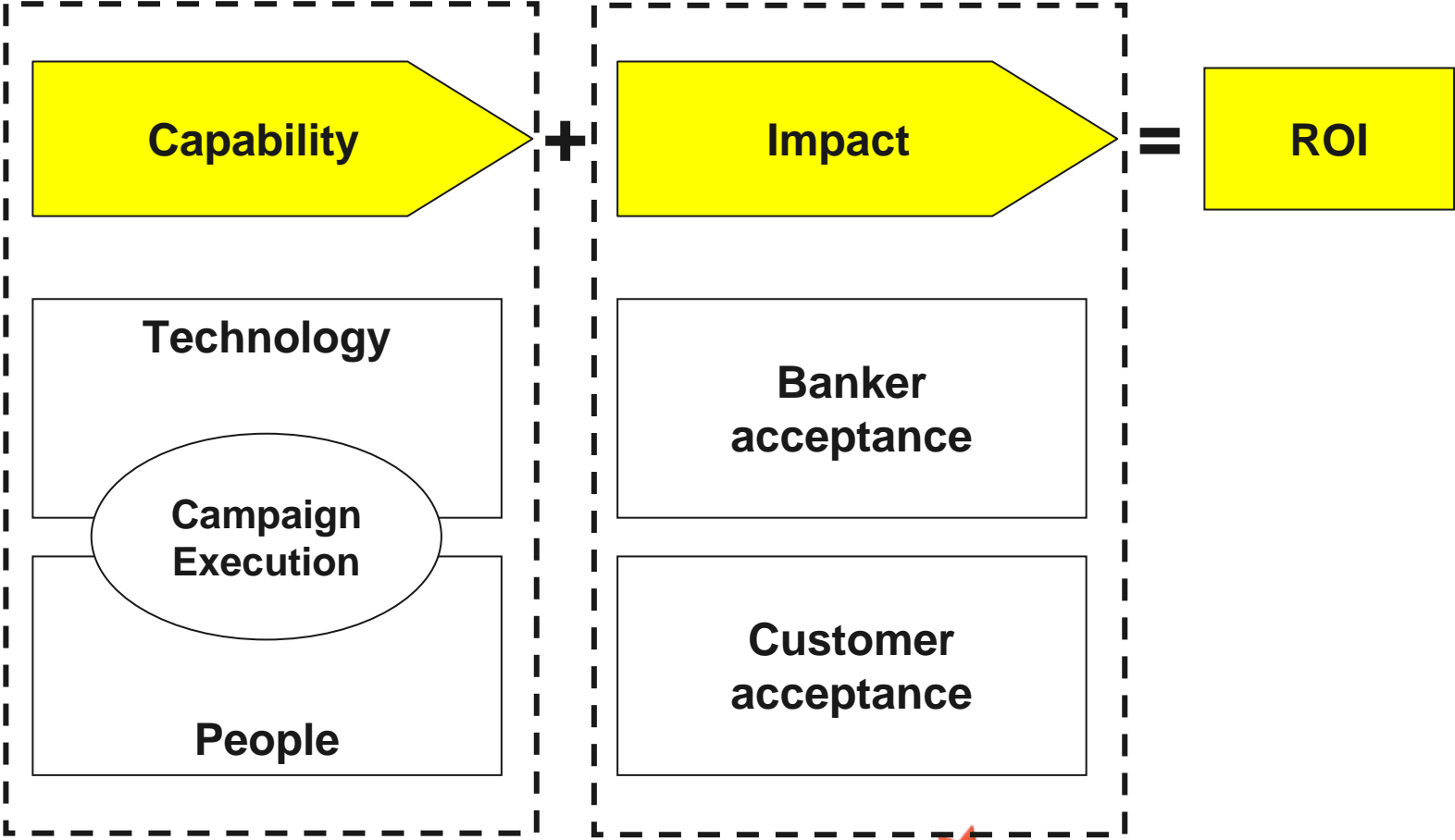
Predictive Modelling



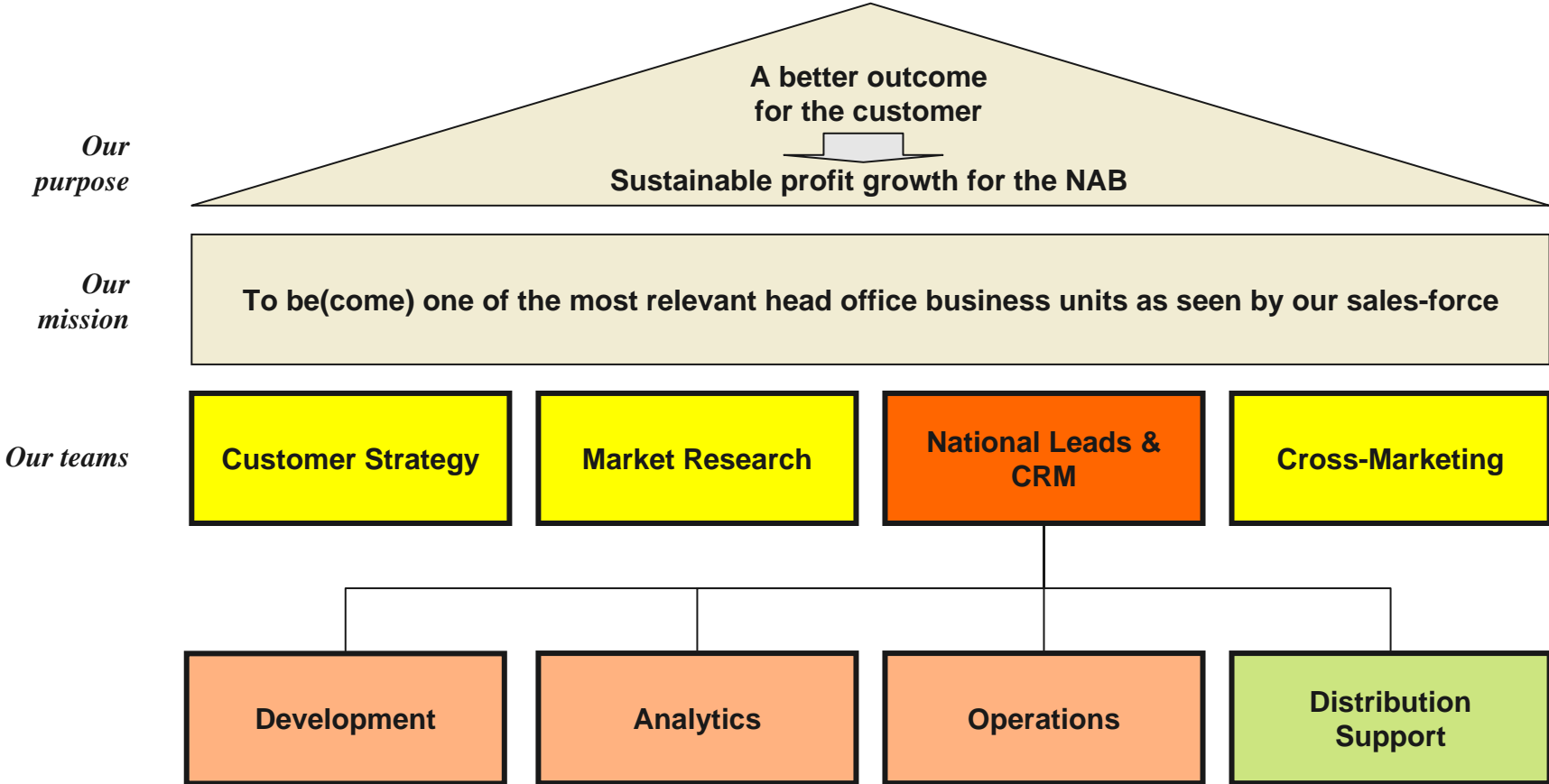
# Campaign features

- ▶ Multi-step, multi-channel, multi-response
- ▶ Ability for lead to be active in multiple channels concurrently
- ▶ Control group methodology
- ▶ Integration with nab.com.au
- ▶ Matching/Prospect capability
- ▶ Individual or relationship marketing
- ▶ Customer contact management

# Re-launch



# Functions



# Sales force engagement

- ▶ Reassess the mixture of Campaigns and Triggers
- ▶ Use the language of the sales force
- ▶ Align CRM development to sales processes and training
- ▶ Answer “What’s in it for me?”
- ▶ Give sales force a sense of ownership over the asset
- ▶ Demystify analytics
- ▶ Replicate best practice of sales force in opportunity identification
- ▶ Measurement, measurement, measurement
- ▶ Identify advocates

# Core learnings

## Re-empowered our Sales force

- ▶ Banker design of campaigns, triggers, content and channels
- ▶ Better integration with banker work-flow
- ▶ Usability improvements to system interface

## Improved quality of leads

- ▶ Removed marginal campaigns
- ▶ Removed misdirected insight
- ▶ Redirected insight appropriately

|         |        | Lead type |   |   |        |        |        |   |
|---------|--------|-----------|---|---|--------|--------|--------|---|
|         |        | Type W    |   |   | Type X | Type Y | Type Z |   |
|         |        | 1         | 2 | 3 |        |        |        |   |
| Channel | Type A | 1         | ✓ | ✓ | ✓      |        |        | ✓ |
|         | 2      | ✓         | ✓ | ✓ | ✓      |        |        | ✓ |
|         | 3      | ✓         | ✓ | ✓ |        | ✓      |        | ✓ |
|         | 4      |           |   |   | ✓      |        | ✓      |   |
| Type B  | 1      | ✓         | ✓ | ✓ |        |        |        | ✓ |
|         | 2      |           |   | ✓ | ✓      |        | ✓      |   |
| Type C  | 1      | ✓         | ✓ | ✓ | ✓      |        |        | ✓ |
|         | 2      | ✓         | ✓ | ✓ | ✓      |        |        | ✓ |

# Core learnings

## Improved measurement and reporting

- ▶ Sales outcomes clearly linked to banker actioning
- ▶ Insight identified to assist sales force where KPI's not met
- ▶ Keeping non-actioning bankers “honest”
- ▶ Identifying champions
- ▶ Identifying best practice of sales force
- ▶ Identifying insight adding minimal value

## New channels

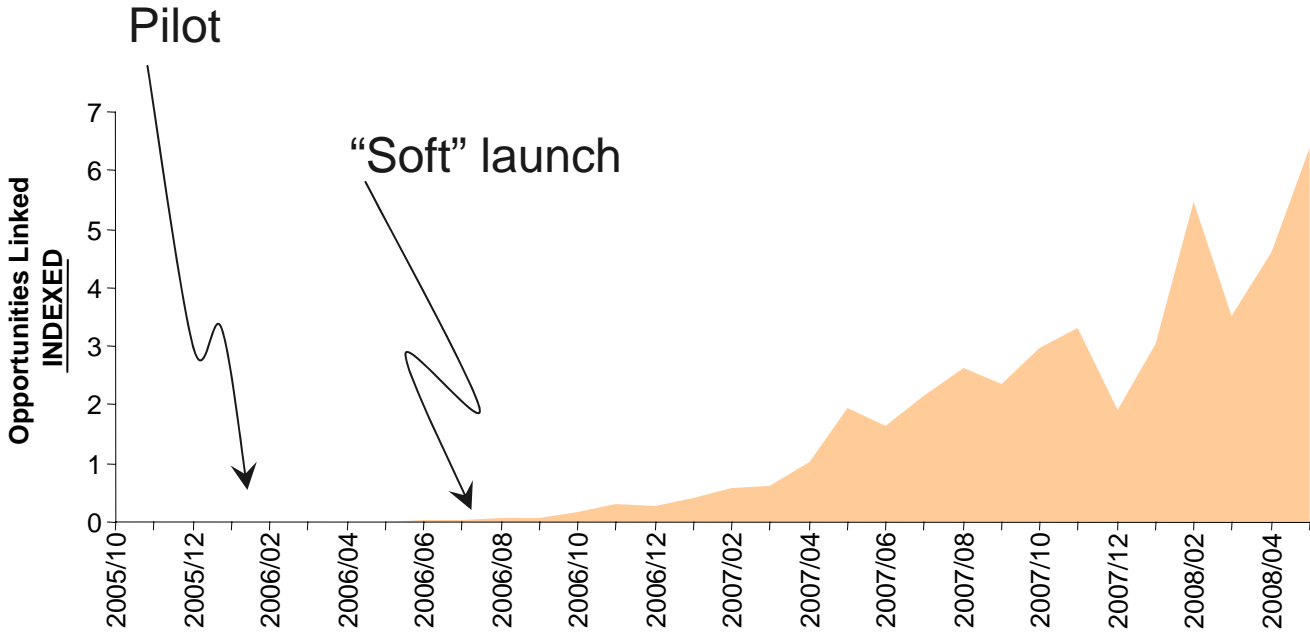
**Trigger library of 150+**

**More models**

# Output (after 1<sup>st</sup> year of re-launch)

- ▶ Lead volume to bankers decreased 15%
- ▶ Marketing campaigns (to action) to bankers decreased 61%
- ▶ Marketing campaigns (to action) to call centre increased 15%
- ▶ Triggers to bankers increased 113%
- ▶ “Mandatory” leads decreased 10%

# Results





**nab**