

SUCCESS STORY



YBS Group, which includes the Yorkshire Building Society, Chelsea Building Society and Accord Mortgages, is one of the United Kingdom's largest building societies. Based in Bradford, England, it has 224 outlets, 4,100 employees, and serves more than 3 million members.



YBS Group sought a system that could help enhance its overall quality of marketing as well as improve audit results and decrease risk.

Challenge

The Yorkshire Building Society relied on disjointed, manual processes to manage financial promotions campaigns across its various entities. The organization required its marketing staff to use “job bags,” which included handwritten notes, to track and approve campaign ideas and materials—which after a series of amendments, could take up to a month to complete.

This workflow process resulted in inconsistent audit trails and made it difficult to ensure the correct supporting evidence could be attributed to each promotion.

Further, internal audits highlighted other areas where improvement could be made to the process around financial promotions, so the organization created a business case for a flexible, automated marketing operations solution that could help it:

- Utilize robust processes with centralized control
- Reduce approval turnaround time
- Analyze and report on activities
- Improve audit results
- Improve overall quality of marketing
- Decrease risk





Solution

Productivity Management

YBS selected and implemented Aprimo Productivity Management to help it create automated, standardized campaign management and approval processes to expedite its speed to market. The solutions would also improve overall campaign quality. Industry recognition of the solution via independent analysts, as well as Aprimo's successful experience with other financial services brands were big factors in the decision.

The organization fully implemented Aprimo Productivity Management in about three months and utilized Aprimo's robust activation services to immediately create new workflow processes and train a small group of users from its marketing support team on the new solution to gain early adoption success. It soon after rolled out the solution to its retail marketing, acquisition, and product teams.

YBS established a no-exception policy that required teams to follow each step of the new automated workflows to gain approvals for campaigns. Because the solution was so straightforward, users quickly became sold on the benefits, said Matthew Cox, Marketing Strategy and Planning Manager. Aprimo Productivity Management also enabled YBS to gain the reporting and analysis features it needed to better optimize resource utilization

For example, it can now measure:

- **How many jobs are in progress**
- **How long each job is taking**
- **How long approvals take**
- **How many review cycle exceptions have been made**



The Aprimo team has proven themselves to be a true partner with great account support and have helped, supported and advised us on best practice methodology to get the most value from the Aprimo platform."

Matthew Cox

Marketing Strategy & Planning Manager, YBS



Results

Now all YBS's financial promotions start and end in Aprimo. Each begins with a brief that a marketer completes and uploads, accompanied by the supporting product governance or product specification documents to help with execution and future audits. The organization then uses the solution to distribute the brief to its in-house or external creative teams, who upload their drafts into it to kick off the new automated approval processes. Once approved, the asset is stored in the solution's central Digital Asset Store using metadata to aid in searches for reuse.

Since implementing Aprimo, YBS has been able to better control workflows, approvals, and the quality of its financial campaigns. Such oversight has enabled the organization to gain efficiencies as it has been able to:

- **Improve confidence around compliance, freeing up legal review time**
- **Expedite the transfer of projects when staff are out of office**
- **Enhance workflows quickly based on user feedback**

By optimizing its new automated processes, YBS has been able to decrease its project rejection rate from 20% to 3% and improve its review/approval turnaround time by 25%. This translates to faster speed to market and faster return on investment. Further, it's been able to reduce reporting time by four days per month across the team—time which team managers previously spent reviewing job comments to determine if they were signed off on by the right people—allowing team members to focus on other important tasks. Using Aprimo also has enabled YBS to reduce its overall risk by having a suite of automated reports that demonstrate that each campaign has the right level of approval before it is issued to market. These reports also reduce the time taken by audit teams when reviewing the approval process.

25% improvement in approval turnarounds

Decreased first-time rejection rate from 20% to 3%

Reduced manager workload by 4 days per month using automated reporting



Aprimo has stringent controls in place that are far superior to the paper job process we had used. The quality of financial promotions has significantly improved, with no instances of unfair outcomes identified."

Matthew Cox

Marketing Strategy & Planning Manager, YBS





About Aprimo

Aprimo offers industry-leading digital asset management and work management solutions that help your teams spend their time and effort on content and marketing strategies that actually drive business outcomes and reach customers in the right channels. Its powerful content operations platform provides organizations with a single source of truth to optimize the way they plan, develop, govern, and deliver exceptional brand experiences at scale.



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