



## **AUTOMATED AND STREAMLINED MARKETING WORKFLOWS WITH APRIMO**

Citizens Financial Group, Inc. is one of the nation's oldest and largest financial institutions, offering a broad range of retail and commercial banking products and services—banking, lending, savings, wealth management, and more—to individuals, small businesses, middle-market companies, and large corporations.





## CHALLENGE

Citizens Bank, like most financial services companies, creates advertising materials promoting their offerings and a huge amount of non-advertising documents like service messages, alerts, and disclosures. The trick is that most of those pieces of content need to be reviewed by members of marketing, legal, and risk. One of the biggest challenges Citizens Bank faced was long review times for the content they produced.

With tasks set up for every step of a project, some projects could reach 50 separate tasks that needed to be resolved before the piece was approved. Not only that, the team was making everybody review and approve every piece of content regardless of the document's complexity or whether the document posed a regulatory risk. This created review cycle times of 14-16 business days.

**// We sometimes had six different people reviewing a simple document. It took 12 days to get through marketing reviews before even getting to legal and compliance. It was mind-boggling. //**

**KATHY GREENE** BUSINESS SYSTEM ANALYST AT CITIZENS BANK



Citizens Bank used Aprimo Productivity Management to streamline production of promotional materials and empower their teams to do less administrative work and focus instead on getting impressive results from the customer experiences they create.

## SOLUTION

### PRODUCTIVITY MANAGEMENT

Aprimo Productivity Management has enabled Citizens Bank to automate multi-step workflows but keep task completion (e.g., content upload) and content review all in one system to maintain audit trail integrity. With Aprimo, content reviews are always completed in the right sequence by stakeholders. Intelligent routing means that the legal and risk teams don't have to receive a task to check if they have to review every time a new piece is created; the built-in scoring model ensures that only the right content goes to the right reviewer at the right time.



## RESULTS

Citizens Bank now has a powerful, one-stop shop for managing planning, financials, and project workflows. With Aprimo, Citizens Bank has been empowered to:



**Reduced cycle times** from  
14-16 business days to  
**4-6** business days



**Reduced legal review  
workload** by **76%**



Brought annual reviews  
down by **2,000**

**// When an auditor asks for details about our checking campaign in a particular quarter, I can pull that information up and give them a clean list of all the activities. //**

**KATHY GREENE** BUSINESS SYSTEM ANALYST AT CITIZENS BANK

With the power to intelligently automate workflows, the team has streamlined reviews across the board and has made the process much smoother for not only marketing, but for the legal and risk teams as well. Aprimo also makes auditing much easier for the team.

Because Aprimo has simplified and automated what were once tedious workflows, everyone across the company—from creative to marketers to compliance—can stop doing work about work and get back to doing the work that matters.

## ABOUT APRIMO

Aprimo provides technology solutions for content, operations, and planning that enable enterprises to optimize their brand experiences and the resources they use to deliver them. Our platform gives enterprises the advantage by streamlining and governing all the behind-the-scenes activities – from ideation to distribution – involved in delivering exceptional brand experiences.

[aprimo.com](http://aprimo.com)

