

Case Study

HML

the **ability** in financial outsourcing

Sector: Financial Services

Product: CANDDi Prospect Analytics
Custom Widgets and Reports

HML is one of the largest financial outsourcers in the UK and Ireland delivering a wide range of administration and analytical services to mortgage savings and loan providers. The company has managed millions of customers for more than 50 leading financial institutions. HML began using CANDDi Prospect Analytics in January 2012.

The Challenge

HML wanted to better track the impact of campaigns against its small list of prospects from the large financial institutions. The aim was to provide better data for its sales team to act against, and benchmark the success of different campaign activities.

Selecting CANDDi

HML's Marketing Planning Manager Richard Howard and Marketing Director Julian Wells examined a range of solutions to their specific need before selecting CANDDi. These included analytics packages, CRM enhancements, and full marketing automation platforms.

"CANDDi was very different to the other solutions we examined. It is focused on collecting and presenting actionable data about individuals. Rather than trying to be the complete platform for all of our digital marketing, CANDDi enables us to add the value we were seeking to our existing campaign tools – tools that are embedded in our business," commented Howard.

This focused approach from CANDDi avoids companies having to conduct large-scale IT projects, change business processes and conduct training in order to start tracking and measuring individual interactions with their online communications. This means faster deployment and much faster return on investment. With open APIs CANDDi can be easily integrated into other web, CRM and campaign systems.

"When the total integration requirement is just three lines of script in the footer, it makes it very quick and simple to deploy," adds Howard.

The Solution

CANDDi Prospect Analytics was deployed in January 2012 and in the first couple of months extended with custom widgets and reports. HML uses enhanced links in Dotmailer campaign emails in order to capture the identity in CANDDi of prospects responding to the campaigns.

Custom widgets include reporting on which site videos prospects have viewed – a key measure of engagement for HML – and on downloads from the site, allowing HML to see who has downloaded brochures and white papers, even without putting these assets behind a registration and login barrier.

The Result

From deployment the company immediately started seeing data about how prospects were engaging with its website. “The first time you see a prospect record with their photo, everything they’ve looked at, and how they found you there’s definitely a ‘wow’ factor – especially when you see new contacts appearing in real-time as they arrive on the site. But this soon gives way to more pragmatic usage and this is where the value comes in.”

HML now uses CANDDi as the primary means to track digital interactions with its top prospects, including those from companies with which it is responding to RFIs/RFPs. This is made particularly easy with company-specific streams, showing all interactions with prospects from a specific business.

Each prospect is ranked using CANDDi’s scoring algorithm based on their engagement across a range of content on the site, defined in consultation with the customer.

“Even before we had made any refinements to the initial scoring, seven of the twenty or so Contacts with scores over 70% were from our top target list. This gave us immediate confidence in the algorithm,” says Howard.

Julian Wells, HML’s Marketing Director concludes: ***“CANDDi enables us to see how engaged our target audiences are with the promotional activity we are producing. Sales cycles in our industry are long and complex. The ability to see that someone with whom we spoke six months or even a year previously has just returned and started to engage with our website again is hugely valuable. CANDDi is opening up a world of new opportunities for us and the information and insight we can now access is of great value.”***

Further Information

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