

# Leading U.S. Mortgage Provider Revamps Data Taxonomy in 6 Weeks

## COMPANY

One of America's leading mortgage providers simplifying the home loan experience

## RESULTS

~50% reduction in internal staff time spent cleaning data

## PRODUCTS USED

[The Data Standards Cloud@](#)  
[Slalom Enterprise Campaign Taxonomy Strategy](#)

## THE CHALLENGE

# Undefined Marketing Taxonomy

After years of struggling to maintain consistent data taxonomy across its brand portfolio, a leading U.S. mortgage provider knew it needed to invest in a well-defined and streamlined marketing taxonomy process.

Combining data sources from its various brands had led to major inconsistencies in data taxonomy and reporting. The team was spending hours creating manual, ad hoc reports to attempt to fill in the gaps, yet the full picture remained incomplete.

Marketing leaders knew that to achieve the desired performance tracking across their marketing and advertising programs, they needed to implement an organization-wide data standardization process.

### They needed to solve these three challenges:

1. Taxonomy inconsistency across channel teams.
2. Lack of tools/technologies to enable marketing taxonomy governance and standardization.
3. Major gaps in centralized reporting due to missing performance tracking metadata.

Selecting Claravine as the data standardization tool to help standardize data inputs, naming conventions, and metadata across all digital channels was the first step. But to achieve its goals, getting the implementation right was critical.

## SOLUTIONS & RESULTS

# Better Together: Claravine + Slalom

Having selected Claravine's platform, [The Data Standards Cloud®](#), to help modernize its data taxonomy, marketing leaders knew they needed support to gain adoption and define the future-state taxonomy strategy for the enterprise.

They turned to Claravine's partner, Slalom, to help ensure implementation was done in a way that would set the company up for future success.

### MARKETING CAMPAIGN TAXONOMY ASSESSMENT AND STRATEGIC ROADMAP

To build an intentional, strategic program, Slalom and Claravine collaborated to identify gaps in the organization's current campaign taxonomy and where they could implement best-in-class data standards.

By defining its marketing taxonomy strategy and streamlining data collection, the team would be able to improve its advertising and marketing performance across the board.

#### In just 6 weeks, the team completed the assessment, which included:

- Taxonomy Audit & Stakeholder Interviews
- Taxonomy Implementation Roadmap
- Gap Analysis
- Comms & Platform Onboarding Plan
- New Taxonomy Strategy & Design

#### Starting by understanding the current state, the team was able to identify:

- Uncoordinated taxonomies across teams
- Manual ad hoc reporting instances
- Unclear audience vs. channel distinctions
- Existing technology tech challenges
- Disconnect between strategy and activation
- Informal taxonomy roles & responsibilities alignment

Following completion of the discovery phase, Slalom and Claravine worked together to create a comprehensive marketing campaign taxonomy based on best practices, historical performance, and the customer's ultimate goals.

#### Clearly defined roles brought important efficiencies to the project:

- Claravine's deep platform expertise ensured best practices were used throughout the project. Getting it right the first time avoided costly rework and ensured the project met its aggressive completion timeline.
- As the primary project manager, Slalom led the taxonomy audit, gap analysis, and future-state marketing taxonomy development. Having an experienced technology consultant as the project lead kept the project on schedule and brought vital industry expertise to the implementation.
- The customer provided project prioritization to ensure the team focused on the most impactful channels and templates first and led internal approvals across project elements.

## TAXONOMY DESIGN FRAMEWORK MAPS FUTURE-STATE DATA STANDARDS & GOVERNANCE

Armed with a deep understanding of the current state, the team began building a Taxonomy Design Framework that focused on five key areas and would serve as the building blocks for a new Taxonomy and Data Governance strategy.

1. **Channel / Focus Area** – Prioritized marketing channels to be incorporated into enterprise data taxonomy standard processes.
2. **Templates** – Developed templates for commonly used data types and channels to simplify data entry.
3. **Users** – Determined who needs access to each specific template, and developed a data governance process for each channel and template.
4. **Inputs** – Identified the type of data that will inform the campaign taxonomy and data governance for each specific channel and template.
5. **Outputs** – Determined final desired output for each channel and template following specific conventions and standards.

Using this framework to map each channel –from Global Campaigns to Paid Social, Paid Search, Email Marketing, and even Affiliate Programs – ensured that the structure created would be usable across programs.

### USABLE DATA STANDARDS IN 6 WEEKS

Upon project completion, the team was armed with a workable plan custom-built for their business to help them implement a data taxonomy that was usable, standardized, and designed to improve reporting.

#### Consistent and standardized naming conventions for marketing platforms

Transitioning from non-standardized processes to a standardized naming convention process improves centralized reporting since data can better answer the questions the teams are looking to answer.

#### Effective governance over marketing taxonomy

Using Claravine's platform, the marketing data operations team can govern the marketing taxonomy elements including naming conventions, URL and lead tracking, and metadata fields.

#### Roadmap to guide the taxonomy implementation and set timing expectations

More than just a new taxonomy design, the client was armed with a roadmap to guide the implementation and set timing expectations with leadership, marketing teams, data engineering teams, and business intelligence teams.

Following implementation, the marketing analytics team saw a **~50% REDUCTION** in time spent cleaning data.

“

“This collaboration serves as a blueprint for other companies wanting a streamlined approach to data standardization within their marketing programs. Claravine and Slalom together promise continued efficiencies while setting the stage for pioneering intelligent data practices and unlocking an advanced digital strategy for our clients. We're looking forward to driving even more transformative successes, seamless implementations, and shaping the future of data excellence with unwavering dedication.”

Nick Miller  
Director of AdTech & Media Strategy

**slalom**

**claravine**

## Get your data up to standard

Concerned about the state of your data? Whether you're starting small or ready to tackle things end-to-end, we can help.

Let's talk