



Top-Ranked Credit Union Simplifies Campaign Management with Standardized Data

COMPANY

Top-Ranked Credit Union

RESULTS

Manual to automated campaign management saves critical time leading to faster campaign launches

PRODUCTS USED

[Claravine Data Standards Cloud®](#)

THE CHALLENGE

Manual Link Tagging Delayed Campaign Launches

A top-ranked credit union relied on a small team to manually create hundreds of campaign URLs, essential for tracking campaigns, programs, and channels effectively.

With nearly 1,000 specific initiatives spread across various campaigns, and each tagged URL taking an average of 15 minutes to develop, the process often stretched into weeks. This led to missed deadlines, delayed campaign launches, and frequent input errors that compromised analytics and reporting accuracy.

In the highly regulated banking industry, where standardized data isn't just beneficial but critical, these challenges posed significant risks. Ensuring regulatory compliance and protecting the company from unwarranted liability includes operating with clear and verifiable data parameters.

What used to take days could now be **ACCOMPLISHED IN A MATTER OF HOURS.**



SOLUTIONS & RESULTS

Centralized, Standardized Data Eliminates Manual Data Entry

As their marketing programs became more personalized, the credit union recognized that their manual process would soon become unmanageable.

They needed to take their campaign tracking out of spreadsheets and implement a solution to automate and enhance URL creation quickly and effectively. Most importantly, they needed a tool to manage a consistent data taxonomy for accurate reporting across initiatives and teams.

To build advanced data tracking functionality, the credit union implemented Claravine's Data Standards Cloud as their centralized platform to track, manage, and standardize marketing campaign data.

Starting with their Paid Media campaigns, the credit union created URL templates that could be used to develop asset-specific URLs quickly. Using Claravine as the centralized hub for link tracking allowed the credit union to standardize data inputs, ensuring data accuracy across initiatives.

Using pre-defined data fields means no data entry errors and a quicker campaign planning process. What used to take days could now be accomplished in a matter of hours.

Since its initial implementation, the credit union has expanded the use of Claravine across its Email and Social Media teams for even more powerful, unified campaign planning and management.



Defined Data Taxonomy Helps Ensure Regulatory Compliance

Financial institutions operate under a complex regulatory framework to protect customer data and its usage for marketing and advertising, including laws like the Dodd-Frank Act, GDPR, and CCPA.

Accurate data is crucial for compliance reporting, and failure to maintain data quality can result in severe penalties. Using a centralized data platform with stringent taxonomy requirements helps ensure compliance and reduces organization risk.

Now, when team members create their campaigns, they are required to enter specific data fields set by management to ensure regulatory compliance. The emphasis on data accuracy and integrity helps make it easy for the credit union to operate transparently and ethically.

A Secure Platform to Ensure Member Trust

Establishing trust is critical for financial institutions. Credit union members need confidence that their financial data is handled securely and that their money is protected.

Using Claravine gave the credit union confidence that their marketing data is accurate and up-to-date, adding an important layer of security that they won't inadvertently engage in unethical marketing practices.

Members can rest easy knowing they can trust their consumer data is well-managed and protected under the applicable regulatory standards.

LOOKING AHEAD

Claravine's recent integration with Snowflake means that the credit union can more seamlessly transfer campaign data from Claravine into the Snowflake Data Cloud for fast, robust, holistic reporting. Giving analytics teams direct access to generate insightful reports and dashboards and give data-driven recommendations with confidence.

The credit union is also looking to add additional integrations into Claravine, including Google Cloud, Google Ads, TikTok Ads Manager, and more to increase cohesion among their marketing tech stack to drive further collaboration across marketing functions.

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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