

Prisma Campaigns

Marketing Orchestration Tool

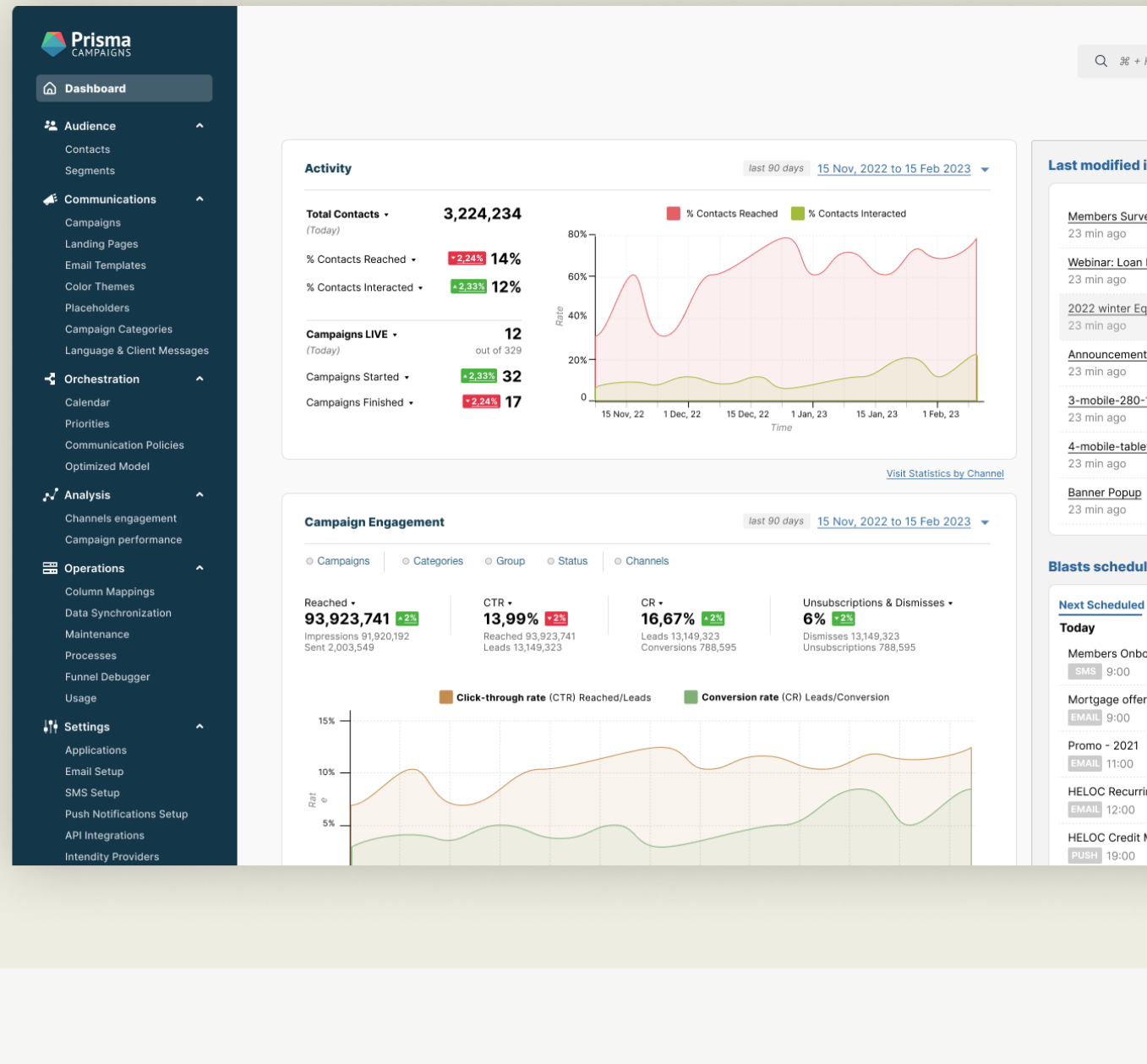
What is Prisma Campaigns?

Prisma Campaigns is a marketing tool that helps financial institutions use their data to improve and personalize communications to their customers.

I joined the company right from the start. We were only a team of 4 engineers and one designer. Today we are 15+ people and I'm still the only designer at the company.

My Role as a Product Designer

- Ideate and develop design concepts by iterating on wireframes and prototypes.
- Execute visual design and design system elements.
- Create and maintain CSS and markup styles using an Atomic SCSS architecture approach
- Hand off designs to engineers by adding markup to Closure/React applications.
- Gather client feedback and conduct internal interviews to inform design improvements.
- Manage outsourced marketing tasks.
- Propose new ideas and present to internal stakeholders.



Project Case

Overview of how Email Communication Channel has evolved over the years, from MVP to market fit and through customer base and target audience growth.

Summary

In 2014 I started as the Founding Designer at Prisma where my first role was to start research and gather information to build an MVP to validate market fit. This process helped us define a scope and an accurate target audience we wanted to fulfill their needs. The development was successful and we validated market fit with a growth of more than 70% YoY.

Along with the growth, the company expanded into the US market and started selling the product to Credit Unions, which brought us a new challenge, which was a new target audience who doesn't have the tools to convert and upload their art into the platform.

I started new research and interviews with our new customers, and we identified a solution, build a WYSIWYG designer as a new way to add their design assets into Prisma campaigns.

Today, the product allows customers to upload their own assets as well as design their designs inside the platform without any technical restrictions.



Build the Product

MVP Ideation and Development

Challenge

Financial institutions have difficulties personalizing static assets and making their communications relevant using their own data.

Goal

Allow uploading communication assets (banners, emails, popups...), and integrate with existing customer data to send relevant and personalized communication.

Solution

We propose a small wizard flow to easily upload content and personalize communications through dynamic variables. Communication channels can be easily 'turn on/off' by turning a switch on the campaign definition.

Target Audience

Marketing specialists Ideate and create communications and assets to send to their customers through Marketing Campaigns. They have medium to high technical knowledge (HTML).

Annotations include:

- Verticals based on banks' organizational structures and target audiences.
- Campaign configuration, period of time and targeting segments.
- Content is divided based on the 'conceptual' steps the customer needs to go through to convert in a campaign.
 - Lead generator**: The way a Campaign communicates with the customer (channel configuration)
 - Funnel**: The list of steps the customer needs to go through until conversion (fill in a form, answer questions...etc)
 - Convert**: The action made by the campaign after the customer converts (i.e. export customers in a .csv file).
- By clicking on the Email Button, a modal is displayed to load the content.

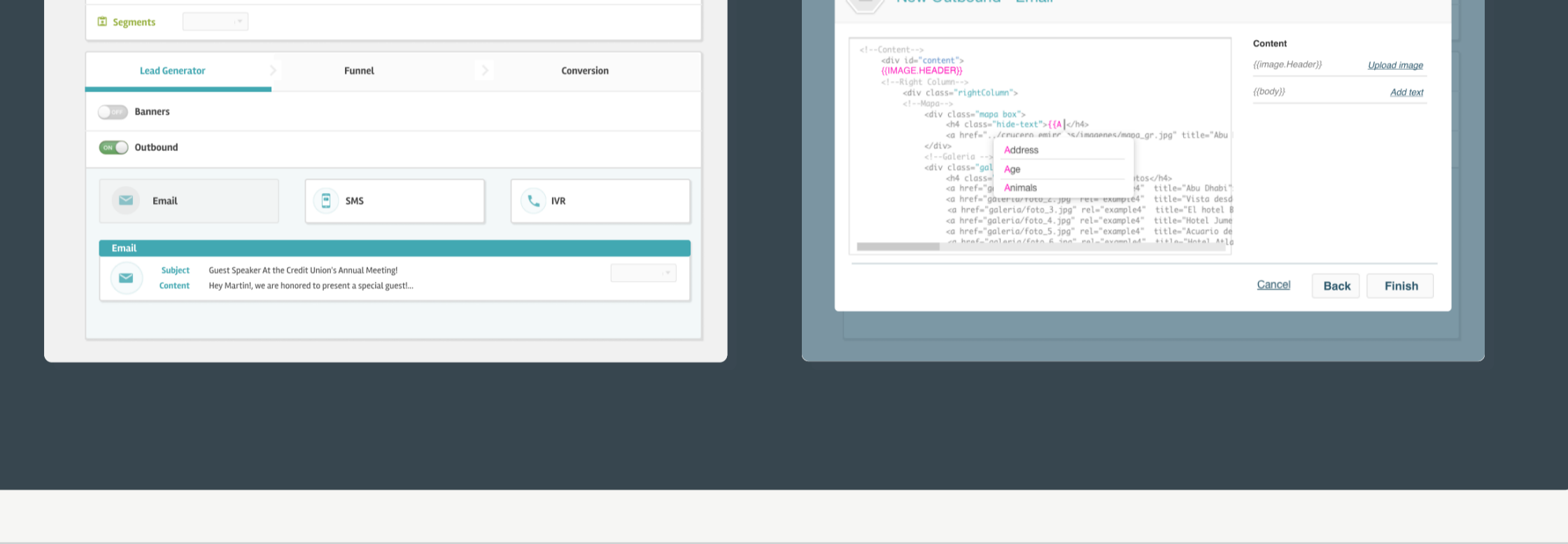
Annotations include:

- Mail headers configuration: From / Subject. The template option allows users to reuse previously uploaded designs, allowing fast and easy customization.
- Personalization tags were added in the markup to allow personalized communication content on the right column. Apart from adding personalized content, it is possible to add tags that bring Customer data into the markup, for example {{customer.name}} or {{customer.age}}.
- Displaying content available to personalize.

Final Results

We completed the MVP and started testing it with one of our prospective customers. We monitored and analyzed whether it met their needs, through qualitative and quantitative data.

After measuring the usage, interactions, and reviews of the product, we confirmed that it solved our customers' cases/needs.



Market Product Fit

As our customer base grew, new challenges started appearing. We not only identified new features to add to the product, such as A/B Testing and content translation, but different types of Financial Institutions started approaching us, such as Credit Unions. This created a new target audience for us who didn't have any code knowledge.

New Challenge

Expanding to US / New Target Audience

Credit unions wanted to use Prisma Campaigns but found that, since it was built with banks in mind, there was a steep learning curve to take full advantage of the product. They didn't have many technical employees who could build HTML or manage them within the platform.

Challenge

Credit Union lacks technical employees who can create design assets in HTML, creating a gap in adoption between the company and the product.

Goal

Enable Credit Union employees to create their own design assets within the platform without requiring HTML coding skills.

Solution

Develop a built-in WYSIWYG designer that will allow Prisma Campaigns customers to create and personalize their own communications without the need for any coding knowledge.

Target Audience

Marketing employees who ideate and define marketing campaigns with low-medium technical knowledge.

* Highlighted in yellow are the notes related to the solution. The others are UI changes made on the product evolution.

Annotations include:

- Based on our research and interviews with current customers, most of them work on the same screens/areas, for example, building campaigns, or building segments.
- Once the channel is turned on, the area of work is shown.
- Email configuration and Email content are configured independently, allowing the user to upload more than one email content to the same email configuration.
- Adding A/B Testing and Translation functionalities. Once turned on, the UI allows the user to upload new Email content for each use case.
- Right from the beginning the user decides which path wants to go through: design their own or upload designs, allowing different types of customers to go through their own flow journey.
- The customer can use templates or start designing from scratch. Templates, which are separated by financial institution categories, are optional to fasten the creation process as well as show all the design capabilities in the tool. New templates can also be added to the library for later use.
- While designing, the customer can view/select a new template, as well as preview their design on different devices.
- Our WYSIWYG designer makes it easy for customers to create beautiful emails. With drag-and-drop building, they can use layout components, design components, or context-only components (like the unsubscribe button on email communications).

Final Results

The final solution contains a full set of functionalities that help our customers create their own designs, personalize them with customer data, and test them through A/B testing. Using pre-assembled templates, or dropping the component into a canvas in our WYSIWYG designer, the users can design communications fast and easily, without any HTML knowledge.

Apart from that, the user can easily test their designs through A/B testing and discover which version converts better.

Other functionalities added in the process were:

- Subscription options
- View in browser
- Reply to address, different than From address.

