

Enable customers to analyze campaigns performance in real-time

Product Feature

Prisma Campaigns

Enables financial institutions to easily orchestrate multiple channel marketing campaigns, using their customer data and personalizing communications to maximize results.



Dashboard

Audience

- Contacts
- Segments

Communications

- Campaigns
- Landing Pages
- Email Templates
- Color Themes
- Placeholders
- Campaign Categories
- Language & Client Messages

Orchestration

- Calendar
- Priorities
- Communication Policies
- Optimized Model

Analysis

- Channels engagement
- Campaign performance

Operations

- Column Mappings
- Data Synchronization
- Maintenance
- Processes
- Funnel Debugger
- Usage

Settings

- Applications
- Email Setup
- SMS Setup
- Push Notifications Setup
- API Integrations
- Intendity Providers

Activity

Total Contacts ▾ **3,224,234**

(Today)

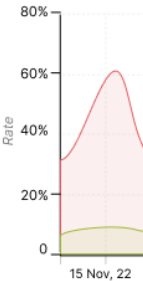
% Contacts Reached ▾ **-2,24%** **14%**

% Contacts Interacted ▾ **+2,33%** **12%**

Campaigns LIVE ▾ **12**
(Today) out of 329

Campaigns Started ▾ **+2,33%** **32**

Campaigns Finished ▾ **-2,24%** **17**



Campaign Engagement

○ Campaigns | ○ Categories | ○ Group | ○ Status | ○ Channel

Reached ▾

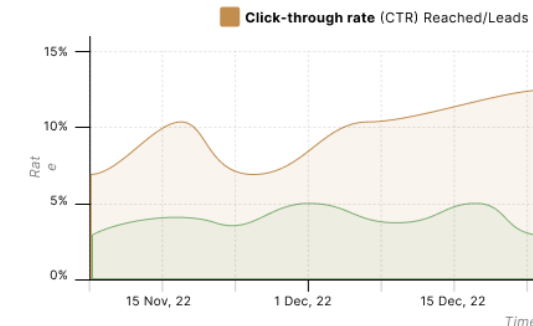
93,923,741 **+2%**
Impressions 91,920,192
Sent 2,003,549

CTR ▾

13,99% **+2%**
Reached 93,923,741
Leads 13,149,323

CR

16
Lea
Cor



Campaign Name

Reached

My role as a Product designer

Responsible for the **end-to-end product design process.**

This process includes interviews with customers to understand their needs and propose solutions through wireframes, to build the solution with their markup and styles.

I feel comfortable in every part of the process, and enjoy delivering solutions to our customers.

Product Vision

Proposing new ideas and present to internal stakeholders.

Contact with Customers

Conducting interviews and gathering client feedback

Ideation

Ideating design concepts on wireframes and prototypes.

Work with Engineering team

Handing off designs to engineers by adding markup to Clojure/React applications.

Visual Design

Executing visual design and design system elements.

Markup & Styles

Creating and maintaining SCSS markup styles.

Product Feature

Enable customers to analyze campaigns performance in real-time

Summary

Analyzing marketing campaign results is essential for measuring success.

Providing this information on the platform will allow our customers to improve their marketing strategy executions.

Objective

Create a data visualization tool that shows all the KPIs that our target audience would seek to evaluate whether the communication strategy was effective or not.

Target audience

Marketing Specialists: Monitor metrics and KPIs to track campaign performance and drive optimization. Developing long-term marketing plans aligned with business goals and market trends

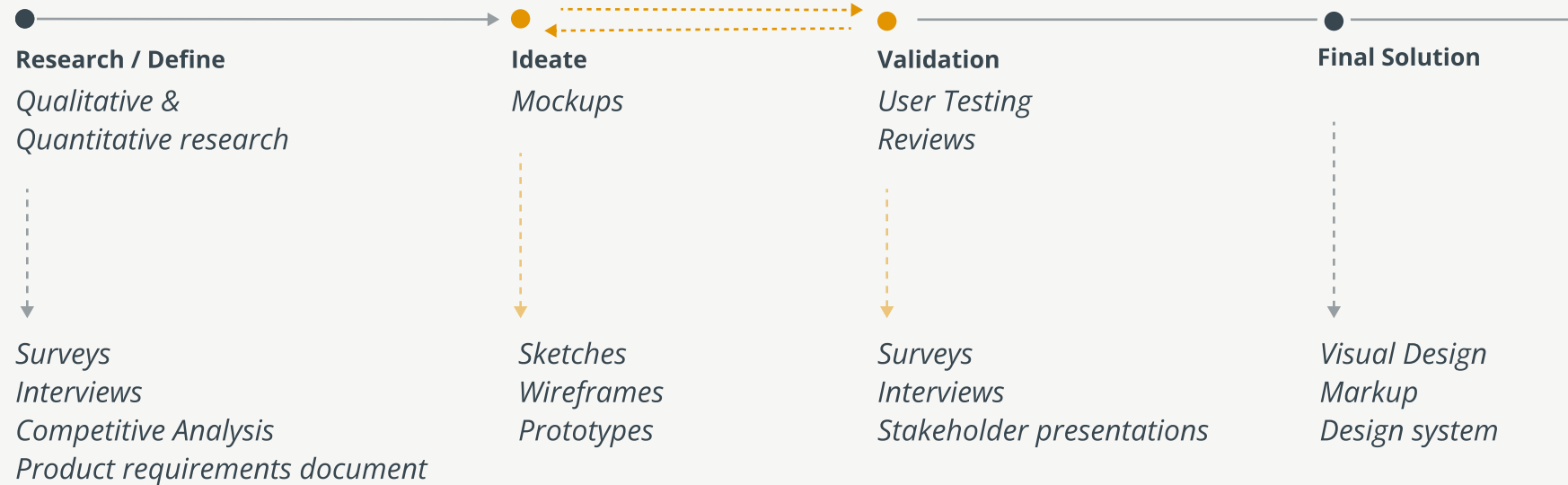
Goal

By analyzing historical and real-time data, enable customers to draw conclusions about past actions to enhance the efficiency of future campaigns.

Process

Research, ideation, prototyping phases, validation and final design

Developing human-centered design (HCD) is prioritizing the needs and wants of the end-users when creating solutions. The iterative process goes through research, ideation, prototyping, testing, and implementation.



Research

Gathering all the user's needs and motivations through different research and observation methods (quantitative and qualitative).

Interviews / Surveys

Some of the questions we used while conducting the interviews:

- What challenges do you encounter when analyzing marketing data?
- Can you provide examples of specific metrics or KPIs that are critical to track in your marketing efforts?
- Can you describe your current process for analyzing marketing data?
- What tools or methods do you typically use?
- How often do you evaluate the effectiveness of communications?

Definition / Output

Once the research is done, the output is analyzed and evaluated to identify what are the main issues to take into consideration in the next step.

These are some of the topics defined to be addressed on the ideation process:

- **Being able to inspect campaign performance over time**
- **How is the campaign behavior throughout the day?**
- **Comparative analysis and statistics by channels**
- **Which communications yielded the best results?**

Ideation #1 Low-fidelity mockup

Inspect campaign performance over time

Easily variate ranges to compare campaign performance by selecting the campaign and the time range.

How is the campaign behavior throughout the day?

Shows # of users consuming the campaign on a daily basis and on which channels.

- **WHEN.** Area chart: series of # Customers vs day hours, to show when users are most frequently interacting with the campaigns throughout the day.
- **HOW.** Table Data: sorted by Channels to identify how users are interacting with campaigns, including # Customers by channel and the trend for each channel.

Comparative analysis and statistics by channels

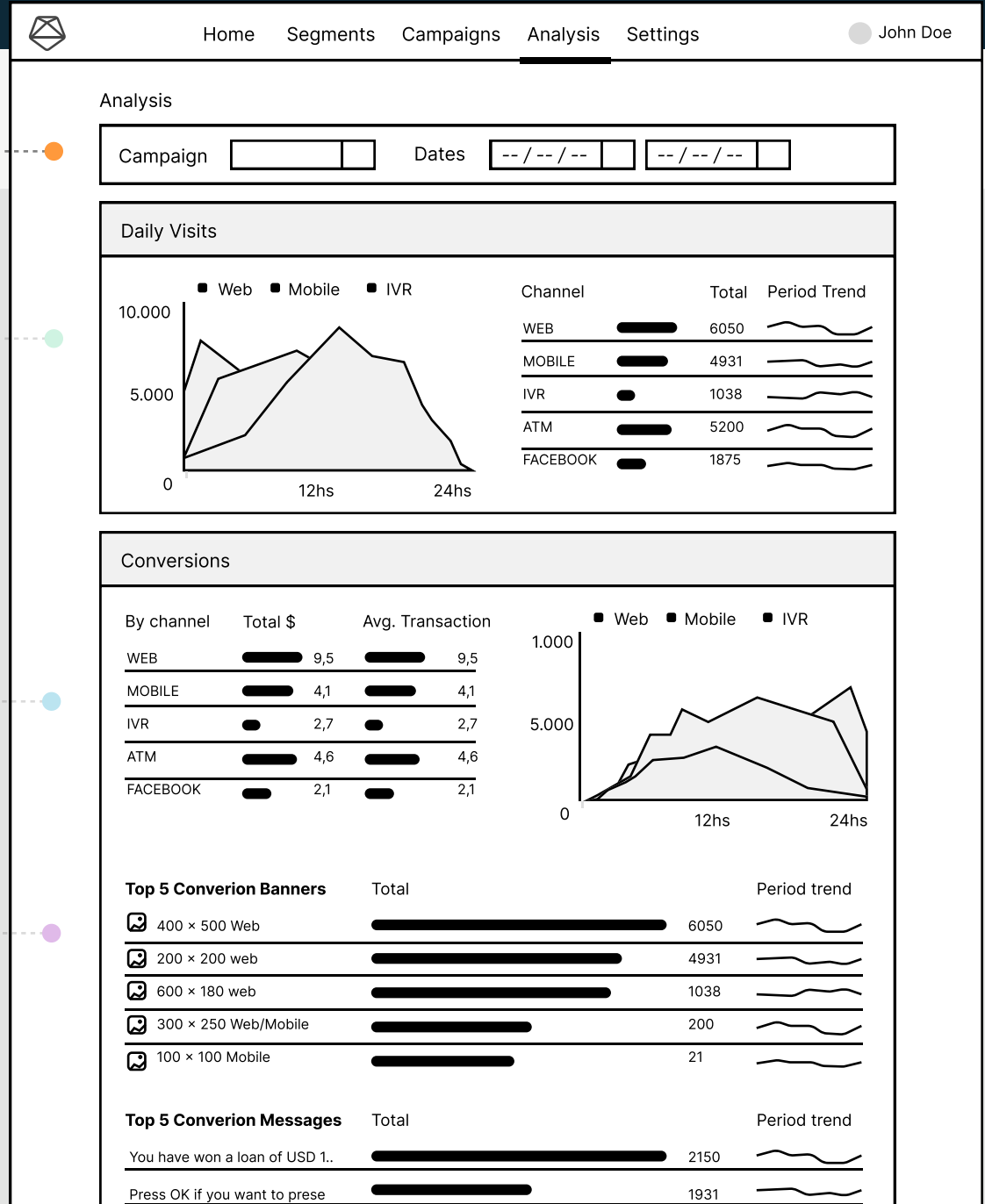
Illustrates # Customers conversions and how that translates into revenue & goals for our Users.

Results separated by channel and time of the day users converted

Which communications yielded the best results?

Rankings

- **Top 5 Banners** (Inbound channel) shown in that period of time and its performance, conversions and trend.
- **Emails** (Outbound channel) blasted on that period of time and their conversion.



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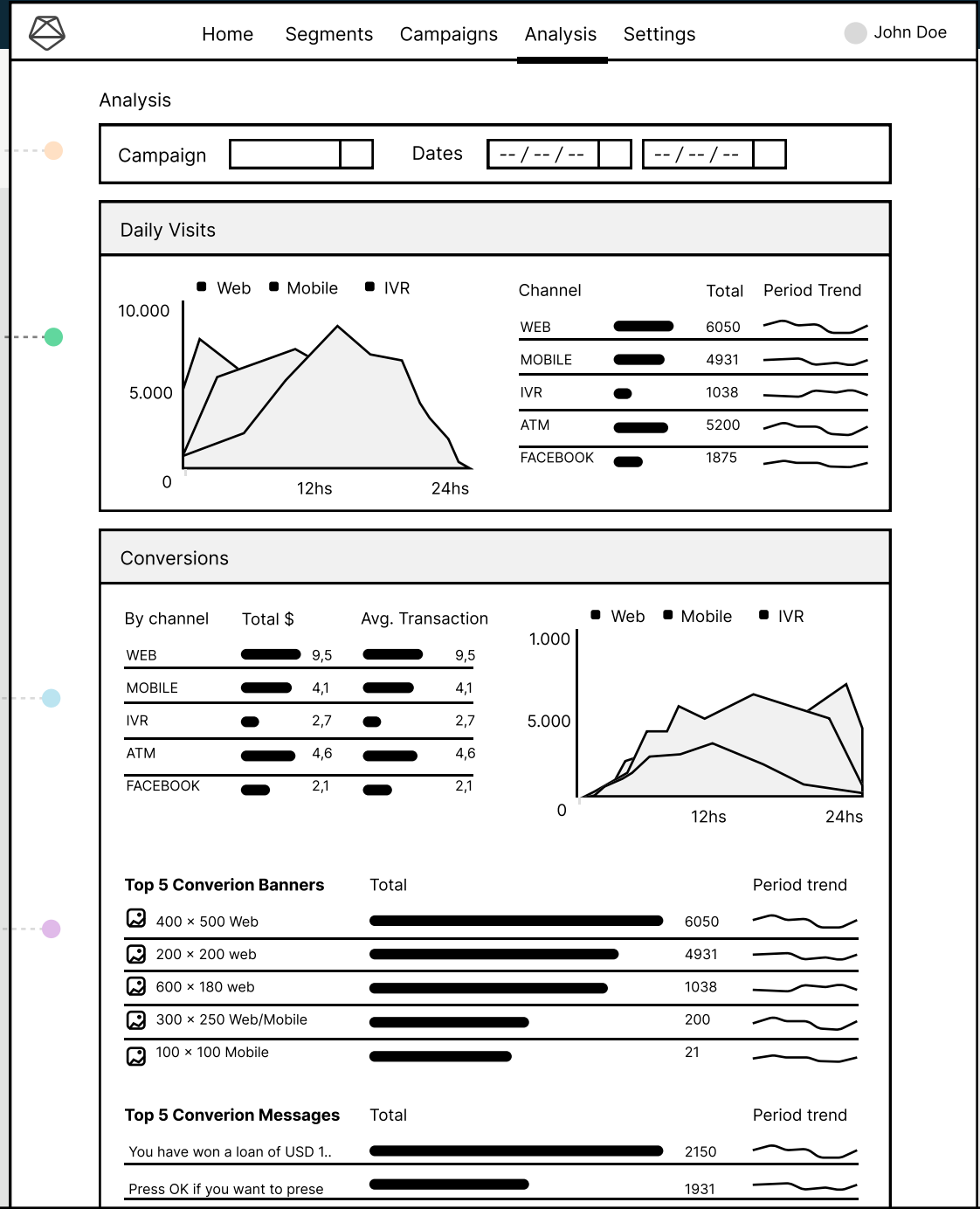
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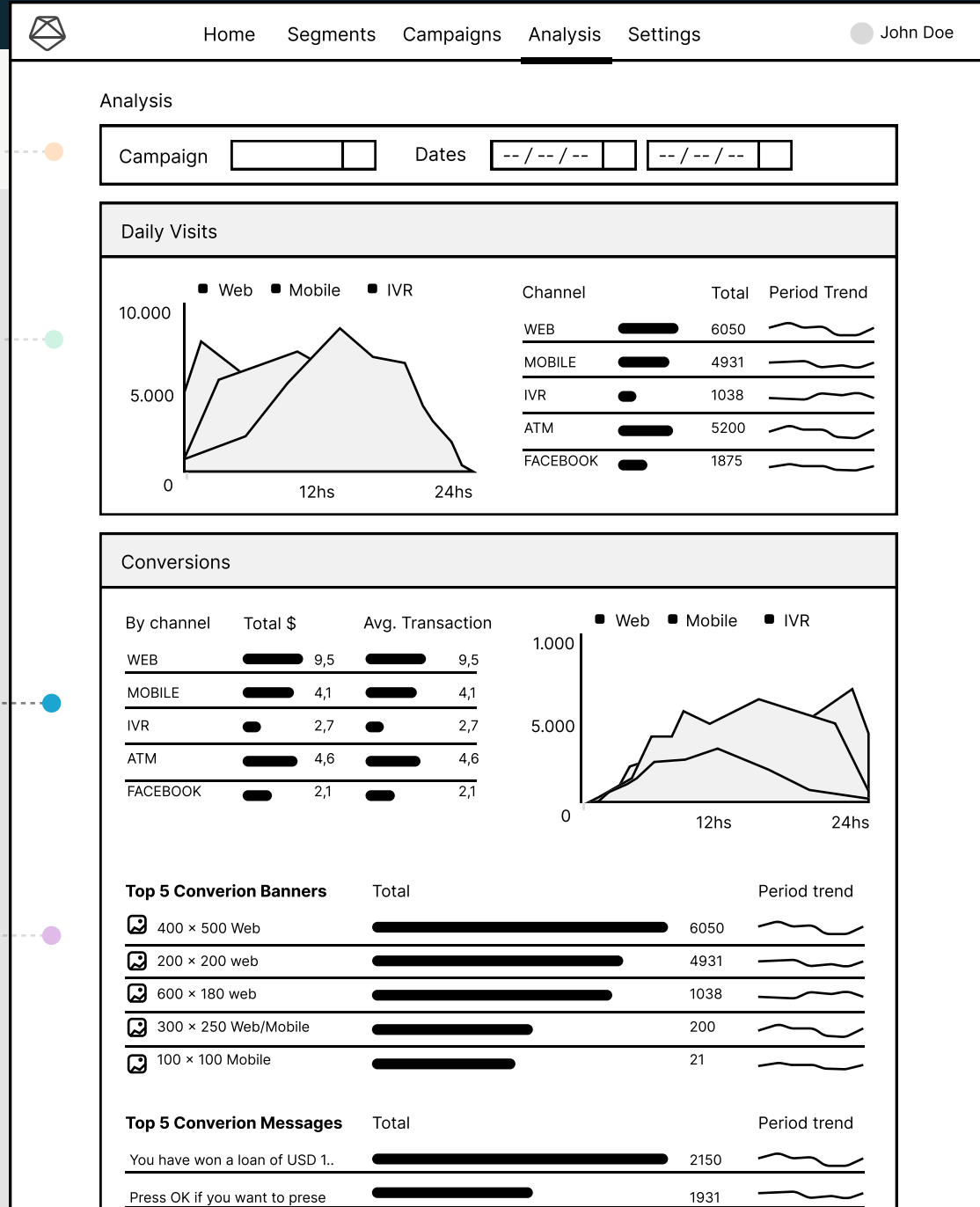
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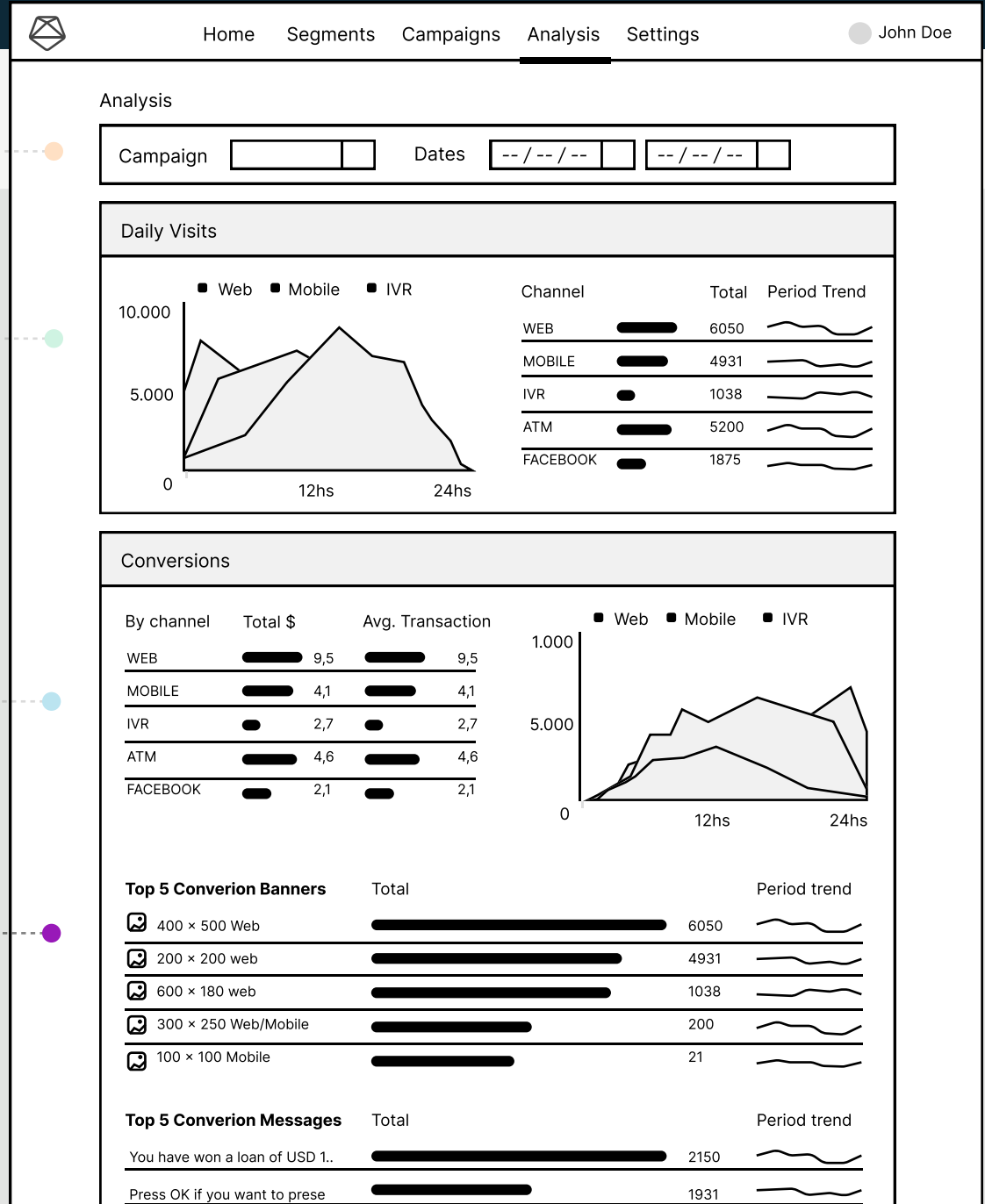
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Validation #1

Testing & Validation

We proceeded to conduct guided interviews with our customers to understand if we were on the right track.

The feedback provided by our Customers was very positive, however we identified more areas where the design could improve:

- **Hard to quickly see how successful the campaign is** and whether new strategy decisions need to be made before it continues.

- **Difficult to understand how each channel behaves**

- Campaigns might use only one channel, and this layout might look very weak in those cases.
- Lack of general statistics per channel.

- **Missing non-conversion data such as views, deliveries, and interactions.**

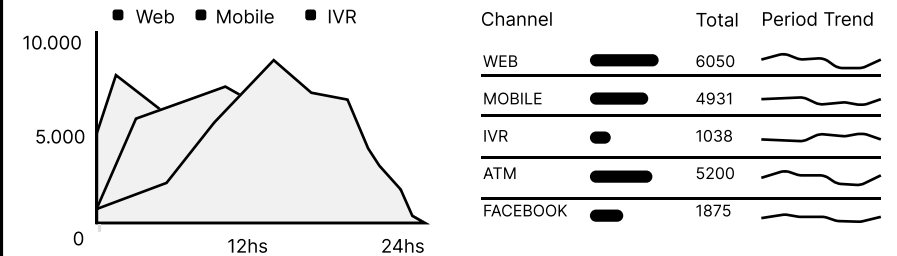
- **No personalization data statistics**



Analysis

Campaign Dates

Daily Visits



Conversions



Top 5 Converion Banners	Total	Period trend
400 x 500 Web	6050	
200 x 200 web	4931	
600 x 180 web	1038	
300 x 250 Web/Mobile	200	
100 x 100 Mobile	21	

Top 5 Converion Messages	Total	Period trend
You have won a loan of USD 1..	2150	
Press OK if you want to prese	1931	

Ideation #2 Low-fidelity mockup

Main area to identify easily campaign performance

- Highlighting campaign status, and all campaign interactions.
- Easier to get a first impression of how the campaign is performing.

Organize statistics by channels, in silos

Separated panels to support more channel's data to review and analyze. This solution improves scenarios where the campaign doesn't use multiple channels.

More granularity in campaign statistics

Banners Channel

- Total channel data summary (conversion, banner prints, etc...)
- Banners conversion rate (left) separated by personalizations
- Banners and Placeholders rankings (right) sorted by conversions

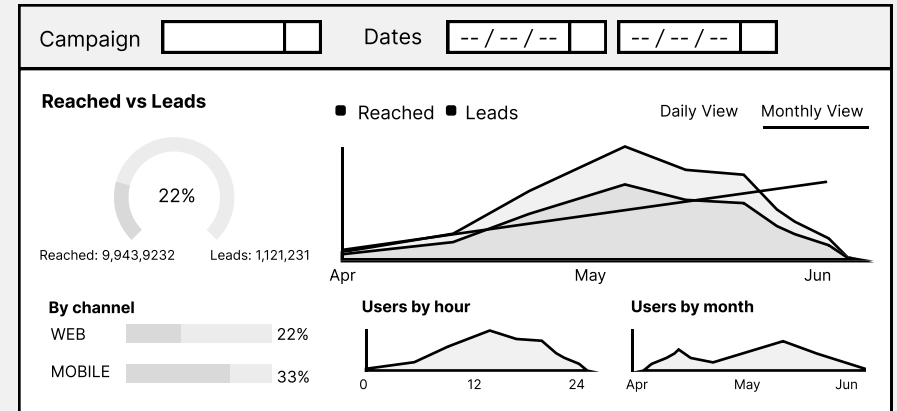
Email Channel

- Chart shows blasts sent during the selected period, and their performance (opened vs sent)
- All blasts are listed with their content sent and their statistics. Each blast can be opened to view their content and details as well if they use personalizations or A/B testing.

Channels turned off

- No stats

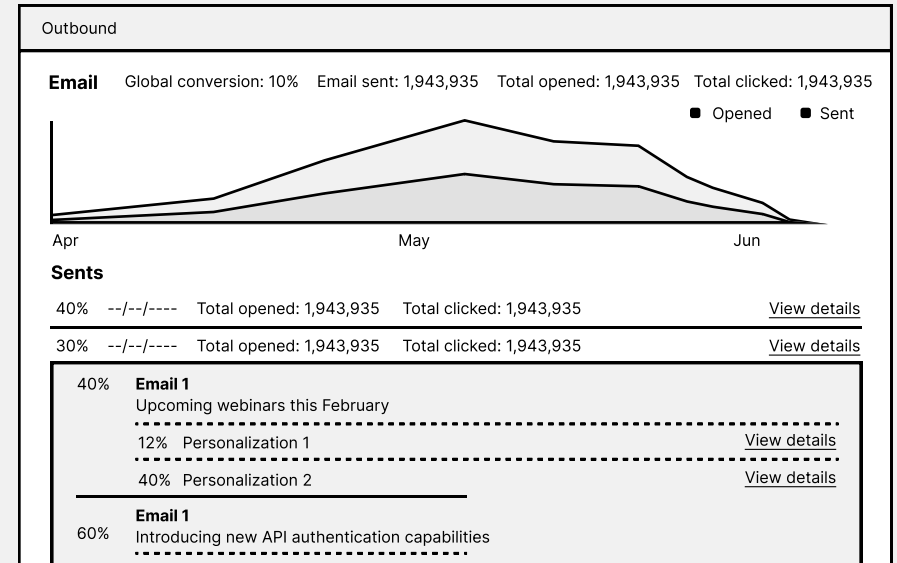
Analysis



Banners

Global conversion: 70% Total banner prints: 943,539

Banners conversion		Total	By Placeholder		By Image
40%	Banners2	18%	Top leads		Total
	400 x 500 Web., 200 x 200 web			400 x 500 Web	40%
	Personalization 1	30%		200 x 200 web	30%
	Personalization 2	25%		600 x 180 web	25%
30%	Banners3	18%		300 x 250 Web/Mobile	21%
	400 x 500 Web., 200 x 200 web			100 x 100 Mobile	14%
	Personalization 1	30%			



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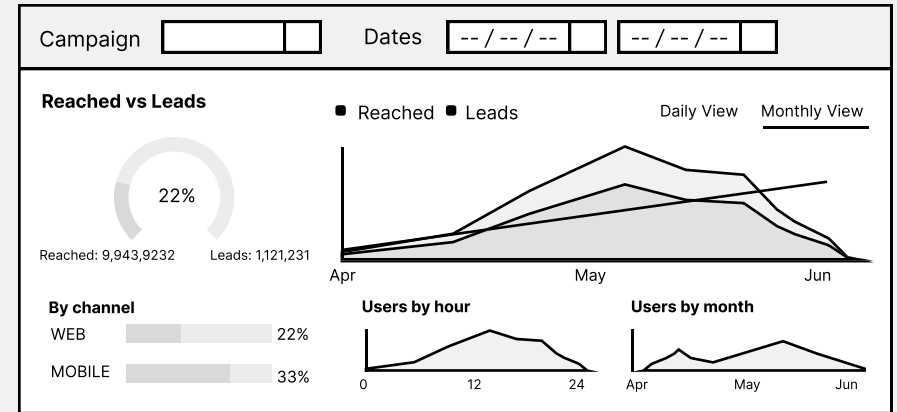
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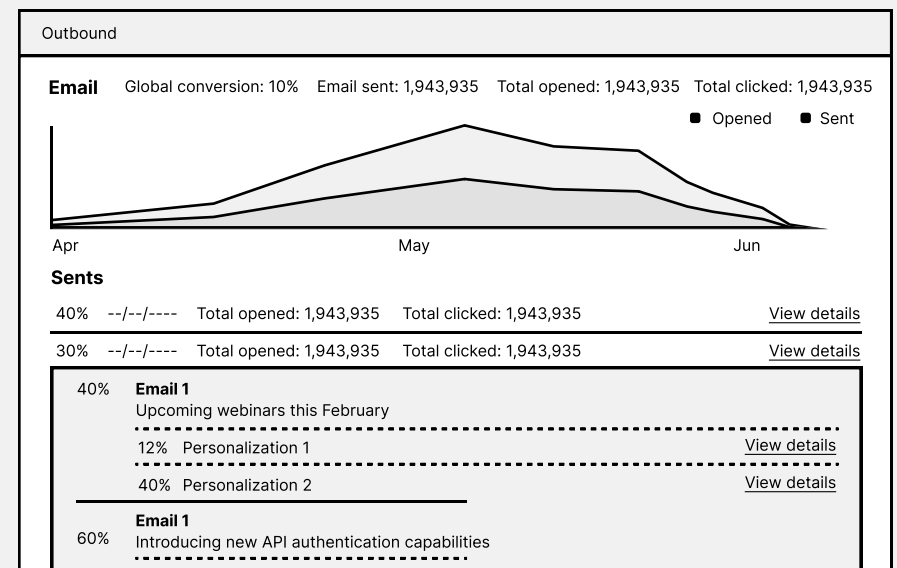
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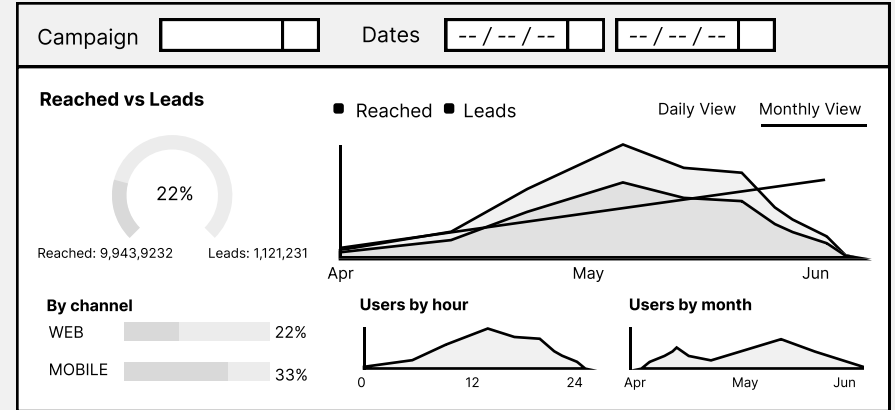
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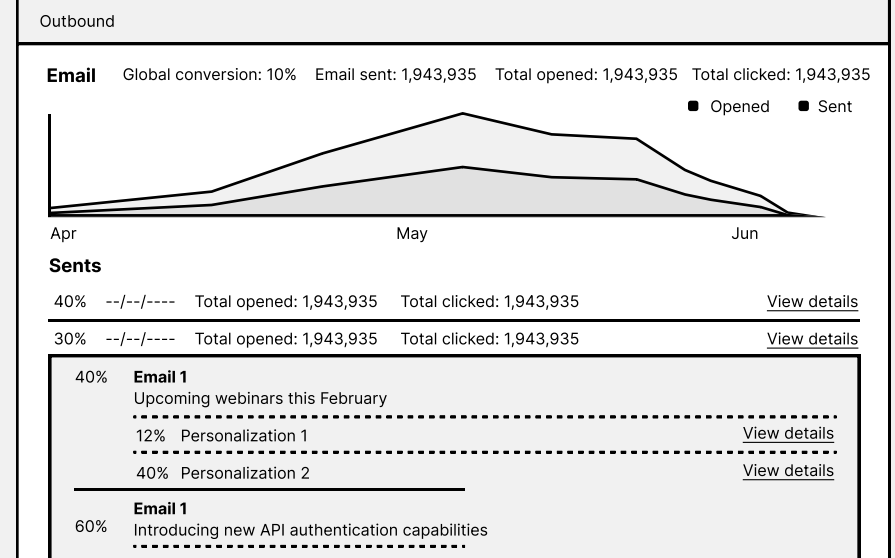
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Validation #2

Testing & Validation

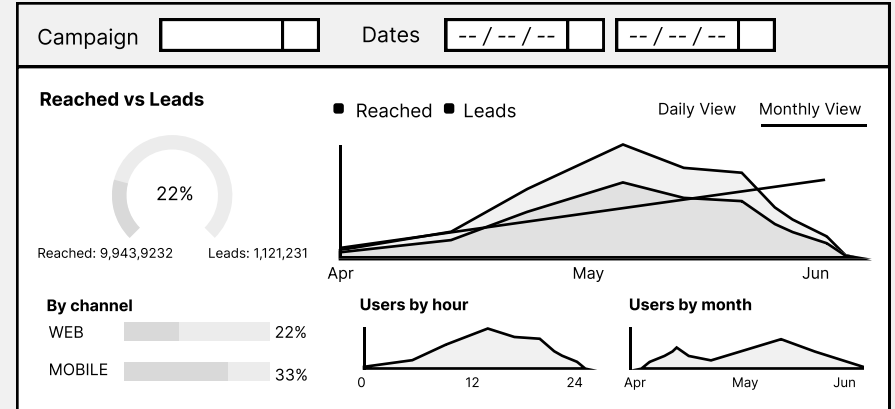
After presenting the new mockup to internal and external stakeholders, all concerns were met and solved.

The two more suggestion we received before moving to high-fidelity mockups were:

- Quick and easy view of all stats summarized

- The screen can potentially be pretty long if the campaign has all channels turned on.

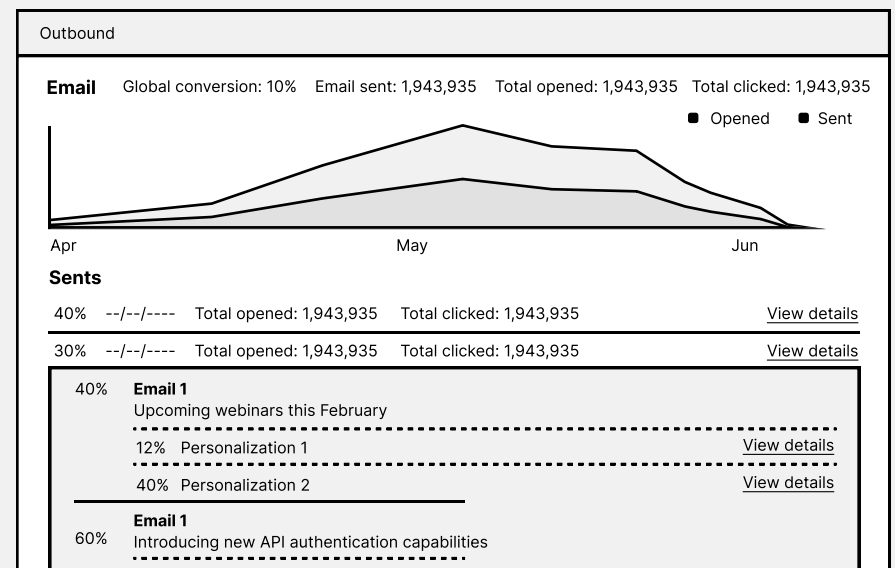
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	Personalization 1	30%	300 x 250 Web/Mobile	21%
			100 x 100 Mobile	14%



● All channel statistics summarized in the fold

Area chart showing campaign behavior and channel data

Table data with all the statistics shown in the top area chart, making it easy to visualize in numbers how the campaign is performing.

● Easy access to each channels

Tab control: allows to easily swap between turned on channels and making it more accesible and optimizing screen space.

Home Segments Campaigns Analysis Settings
John Doe

Campaign Name
Dates

Campaign Overview

■ Reached ■ Engaged ■ Leads ■ Conversion ■ Dismiss ■ Unsubscribes

	Reached	Engaged	Leads	Conversion	Dismiss	Unsubscribes
Banners	1,943,935	--	43,935	1,943,935	935	--
Emails	24,942	12,211	942	24,942	--	42
SMS	--	--	402	402	--	2
Push Notifications	--	--	32	32	--	2
Automatic Popups	909,843	--	9,843	909,843	43	--

▶ Details

Banners
 Email
 SMS
 Push Notifications
 Automatic Popups

Email Global conversion: 10% Email sent: 1,943,935 Total opened: 1,943,935 Total clicked: 1,943,935

■ Opened ■ Sent

Sents

▶ 40% --/--/---- Total opened: 1,943,935 Total clicked: 1,943,935 [View details](#)

▼ 30% --/--/---- Total opened: 1,943,935 Total clicked: 1,943,935 [View details](#)

40% **Email 1**
Upcoming webinars this February

12% Personalization 1 [View details](#)

40% Personalization 2 [View details](#)

60% **Email 1**
Introducing new API authentication capabilities

Personalization 1

▶ 14% --/--/---- Total opened: 1,943,935 Total clicked: 1,943,935 [View details](#)

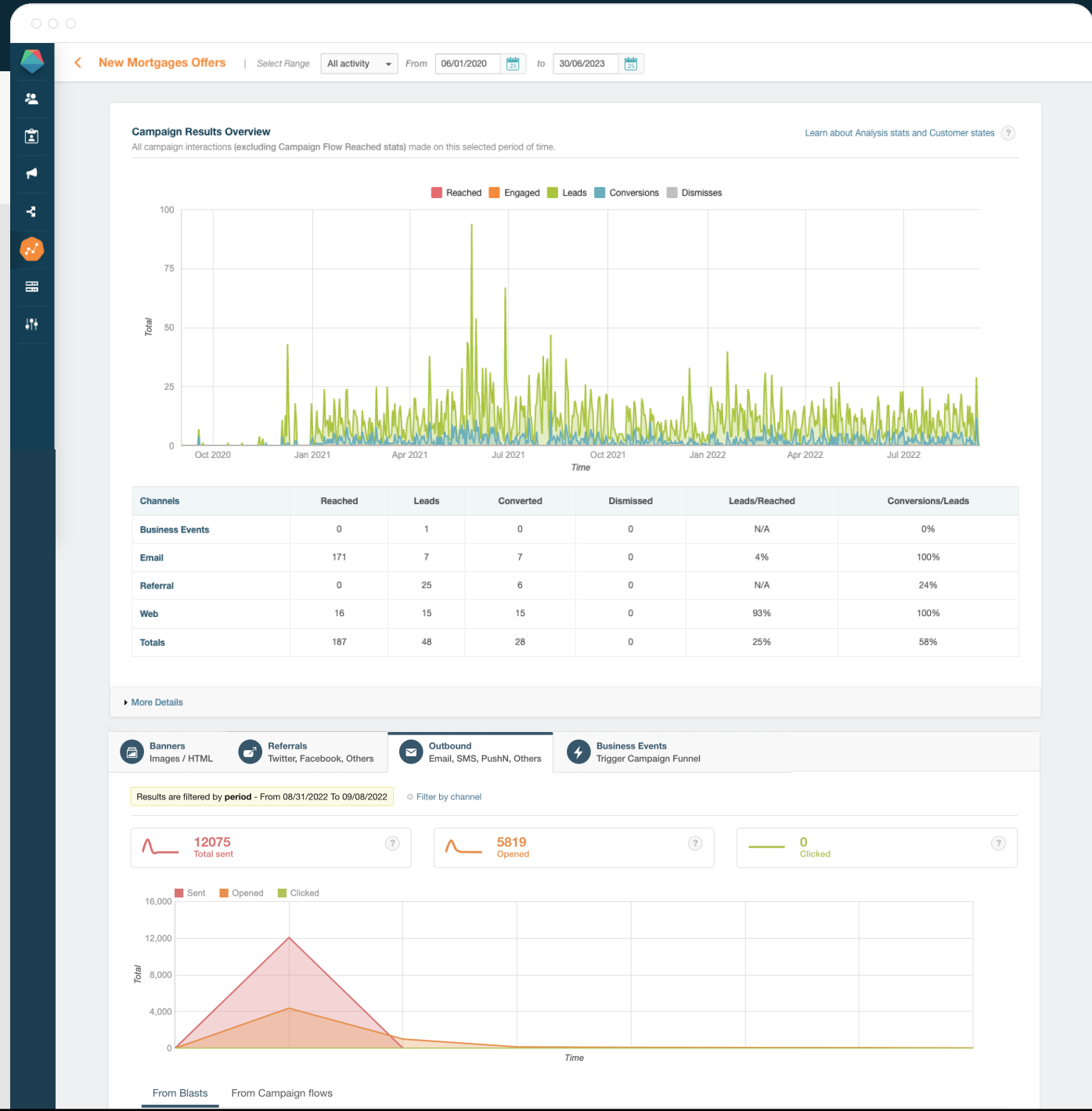
▶ 40% --/--/---- Total opened: 1,943,935 Total clicked: 1,943,935 [View details](#)

Final Solution

Visual Design

Taking into consideration that the platform was already using a design system, we began adding the visual design layer, reusing as many existing components and styles as possible.

This approach also helped the engineering team to build the UI without any hassle.



Final Solution

More Details

Banners Images / HTML Referrals Twitter, Facebook, Others Outbound Email, SMS, PushN, Others Business Events Trigger Campaign Funnel

Results are filtered by period - From 01/06/2020 To 07/01/2023

16 Reached users Banners were displayed 38 times. 15 Leads Created Banners were clicked 24 times. 15 Conversions Users converted 15 times on this campaign

Banners performance, A/B testing and Rankings

Banner Conversion Between 01/06/2020 and 07/01/2023

		Unique Users			% Rates			
		Viewed	Clicked	Dismissed	Leads	Converted	Clicked/Viewed	Conversion/Leads
Fraud Alert: Phishing Scams: August 2022_MobileBanner_EN								
800x476	HomepageBannerMobileEnglish	7076	0	0	0	0	0%	N/A
	HomepageBannerMobileEnglish	7076	0	0	0	0	0%	N/A
Fraud Alert: Phishing Scams: August 2022_Website Banner_ES								
1920x600	HomepageBannerDesktopSpanish	67	0	0	0	0	0%	N/A
	HomepageBannerDesktopSpanish	0	0	0	0	0	N/A	N/A
	HomepageBannerDesktopSpanish	67	0	0	0	0	0%	N/A

Rankings Between 08/31/2022 and 09/08/2022

		Unique Users			% Rates			
		Viewed	Clicked	Dismissed	Leads	Converted	Clicked/Viewed	Conversion/Leads
Ranking by Images								
	Fraud Alert: Phishing Scams: August 2022_MobileBanner_EN	8899	0	0	0	0	0%	N/A
	HomepageBannerMobileEnglish	8899	0	0	0	0	0%	N/A
	Fraud Alert: Phishing Scams: August 2022_Website Banner_ES	75	0	0	0	0	0%	N/A
	HomepageBannerDesktopSpanish	75	0	0	0	0	0%	N/A
	Fraud Alert: Phishing Scams: August 2022_Website Banner_ES	1	0	0	0	0	0%	N/A
	HomepageBannerDesktopSpanish	1	0	0	0	0	0%	N/A
	Fraud Alert: Phishing Scams: August 2022_Website Banner_EN	8899	0	0	0	0	0%	N/A
	HomepageBannerDesktopEnglish	8899	0	0	0	0	0%	N/A
	Fraud Alert: Phishing Scams: August 2022_Website Banner_ES	76	0	0	0	0	0%	N/A
	HomepageBannerMobileSpanish	76	0	0	0	0	0%	N/A

More Details

Banners Images / HTML Referrals Twitter, Facebook, Others Outbound Email, SMS, PushN, Others Business Events Trigger Campaign Funnel

Results are filtered by period - From 08/31/2022 To 09/08/2022

12075 Total sent 5819 Opened 0 Clicked

Blasts data aggregation to visualize customers' behavior

Content variations from personalizations and A/B testing to different languages, for each blast.

From Blasts From Campaign flows

Outbound Blasts Between 08/31/2022 and 09/08/2022

- 48% 2022/09/01 - 17:18 12070 Sent 5814 Opened Clicked 4122 not delivered FINISHED
- 100% 2022/09/01 - 16:45 4 Sent 4 Opened Clicked 0 not delivered FINISHED

English Spanish French Has A/B Testing: Random

	Sent	Opened	Clicked
Designer	100% (2)	100% (2)	0% (0)
Name: Email			
Subject: This is a subject in different languages ((customer.id))			
View clicked links			
1 The customer preferred language is Spanish			
Designer	100% (2)	100% (2)	0% (0)
Name: Email			
Subject: This is a subject in different languages ((customer.id))			
View clicked links			
Top clicked links			
All variants together			
[Campaign Link] Funnel source: iOS	432		
[Campaign Link] Funnel source: android	231		
www.companyuser.com/referral/970453045903970094	86	3%	100% (2)
www.companyuser.com/referral/597004574572346332	75	3%	100% (2)
(1) www.instagram.com/companyuser	4	3%	100% (2)

Top clicked links All variants together

- [Campaign Link] Funnel source: iOS 432
- [Campaign Link] Funnel source: android 231
- www.companyuser.com/referral/970453045903970094 86
- www.companyuser.com/referral/597004574572346332 75
- (1) www.instagram.com/companyuser 4

After implementation

For tracking and analyzing the success of the functionality, different KPIs such as user engagement, user satisfaction, ease of use, and feature adoption were defined. These measurements were obtained through metrics within the product and biweekly interviews with the clients.

In the case of metrics within the product, these were some of the ones analyzed:

- Number of searches by ranges
- Number of analysis visits
- Iterations in LIVE campaigns
- Tracking of conversions in campaigns over time

Although this is a multifactorial results, here are some of the improvements our customers made:



Up to 16% conversion rate



6X more HELOC sales
500% increase in engagement
\$3.5M direct sales



3X sustained increase in short-term loans
2X open rate



330% increase in submissions
51% open rate

End