

THE 2019 EXCELLENCE IN MARKETING & COMMUNICATIONS AWARDS

REFINITIV

CATEGORY | AGILE MARKETING
DIVISION | CORPORATE

Describe the Challenge

The Unified Customer Journey was created to enhance the transformation of turning a site visitor into a loyal customer. The process consists of five key areas offering the smoothest and best digital customer experience possible:

- 1  Awareness
- 2  Lead Gen
- 3  Sale
- 4  On-boarding & Retention
- 5  Support & Renewal

This project aligns the thoughts of five distinct teams within Refinitiv from Marketing to Development to Sales and Retention. We've gathered the best minds in one of the world's most progressive companies to create a simpler customer journey which makes the user number one. The knock-on effect of customer satisfaction is more sales, better retention and a lower level of support tickets.

All this combined has allowed Refinitiv to reach new heights in the dawn of a new age for providing data where the user expects high quality treatment and efficient workflows.

Define the Target Audience

We power the global financial community through trusted information and news, community and insights. Energy companies, investment firms, brokerage houses, industrial conglomerates, global corporations, and the largest global banks all trust us to support and enable their most crucial financial decisions.

Describe the Solution

Through our market-leading Refinitiv Eikon, Elektron and Risk Management solutions, we help our customers generate superior returns, improve risk and compliance management, increase access to liquidity, and create efficient, reliable infrastructure.

Our mission is to drive customer growth and innovation with our trusted unified platform—enabling the industry to discover, transact, and manage risk. We anticipate market shifts and evolve to meet them.

Where there are silos, we build connections. Where there's an abundance of data, we facilitate the discovery of powerful insights. Where there's opportunity, we enable liquidity. Where there's regulation, we deliver clarity. When there's a need to do more with less, we drive efficiency.

To ensure the customer journey be reformed to enable the smoothest and unified process, the journey was split into five key stages—transforming a lead to a loyal customer. The overall, end objective was to retain our customers—transforming the adoption and usage phase. Regardless of the portal the customer used, all would be guaranteed a high level of.

Describe How the Solution Was Deployed

Phase 1
AWARENESS



Interaction and awareness with online social content

- Social Media channels: Twitter, LinkedIn, YouTube, Videos
- Financial & Risk: Inside F&R Blog

Phase 2
LEAD GEN



Acquiring the customer through organic search

- SEO, PPC

Phase 3
SALE



Turning the lead into a customer: Welcome Stream

- Sales portal

Phase 4
ON-BOARDING
& RETENTION



Digital User Experience team—offering ongoing training and support to all new users

- Email, videos, chat support

Phase 5
Key Phase of
SUPPORT &
RENEWAL



Customer benefits from authorized, personalized suggestions based on the user's profile and site usage

- Use of Eloqua, email signatures, learning videos

Describe the Qualitative or Quantitative Measures of Success

Step 1 AWARENESS



Social Media Marketing

Summits	6	Paid social media clicks	51,000
Live-streams	5	Articles	250+

Social Content—Educating Our Prospects

Total users/readers	252,000	Accessed the blog through organic search	153,000
Click-thru rate from blog to site	5.5%		

Social Summits

Twitter reach	7.2 million+	Social reach (NYC Summit, May 2018)	2.2 million
Registrations	900+		

Step 2 LEAD GEN



Financial

	Leads		Opportunities	
	2017	2018	2017	2018
Americas	3,978	5,347	1,290	2,083
Europe	4,681	5,632	1,328	1,200
Asia	2,087	2,791	409	455

Risk

	Leads		Opportunities	
	2017	2018	2017	2018
	6,627	4,941	2,421	1,834
	3,136	3,812	1,214	1,277
	1,610	1,664	566	450

Step 3 SALE



Lead Development Model

Lead conversion rate	22.3 percent
Lead to win rate	2.4 percent

Step 4 ON-BOARDING



Welcome Stream

Open rate	24 percent
Click through rate	5 percent
Click to open rate	22 percent

Email Campaigns

Eikon users reached each month	50,000+
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Step 5 SUPPORT & RETENTION



Overall Customer Satisfaction

April 17	49 percent
Today	61 percent
2020 forecast	85 percent

List the Tools Involved

- Summits
- Live-Streams
- Paid Social
- Articles
- Social Advocacy
- Social Content
- Quarterly Infographics
- Search Marketing
- Personalization: Tailored User Experiences
- Lead Specialist Function:
Dedicated Resource to Lead Qualification
- Lead Development Model
- Welcome Stream
- Email Campaigns
- In-product Messaging
- My Account
- My Account key features
- Google suite
- Adobe suite

About the Excellence in Marketing and Communications Awards

The Excellence in Marketing and Communications Awards, presented by The Conference Board Marketing and Communications Center, honors organizations for their innovative use of communications technologies. Formerly the Society for New Communications (SNCR) Excellence Awards, the case study program has been recognizing excellence for 13 years. The awards were presented at a gala and dinner on June 26, 2019, in New York City.

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THE CONFERENCE BOARD, INC. | www.conferenceboard.org

AMERICAS | +1 212 759 0900 | customer.service@conferenceboard.org

ASIA | +65 6325 3121 | service.ap@conferenceboard.org

EUROPE, MIDDLE EAST, AFRICA | +32 2 675 54 05 | brussels@conferenceboard.org

THE COMMITTEE FOR ECONOMIC DEVELOPMENT
OF THE CONFERENCE BOARD | +1 202 469 7286 | www.ced.org

THE CONFERENCE BOARD OF CANADA | +1 613 526 3280 | www.conferenceboard.ca

PUBLISHING TEAM

Peter Drubin, Pam Seenaraine, Ray Vella

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