



Loadata

CASE STUDY: Making contact data work for you

INTRODUCTION

Some of the key things in any marketing campaign are relevant content, call to action and follow up. Successful campaigns also need to have **accurate contact data**. So, if you have little or no contact data to start with, **where do you begin?** In this case study we look at how Autus helped an Asset Manager to achieve a series of phenomenally successful marketing campaigns.

ASCERTAINING WHAT CONTACT DATA WOULD BE NEEDED

Autus listened to what the Asset Manager was looking to achieve and then explained what was available. The process began with the completion of the Autus checklist. This ensures that clients only purchase contact data that meets their needs, all in one easy to use Excel file.

WHAT AUTUS PROVIDED

With the Asset Manager having selected relevant Firms and Registered Individuals, Autus delivered their data. A breakdown by Job Role, Firm count and number of Registered Individuals is shown below.

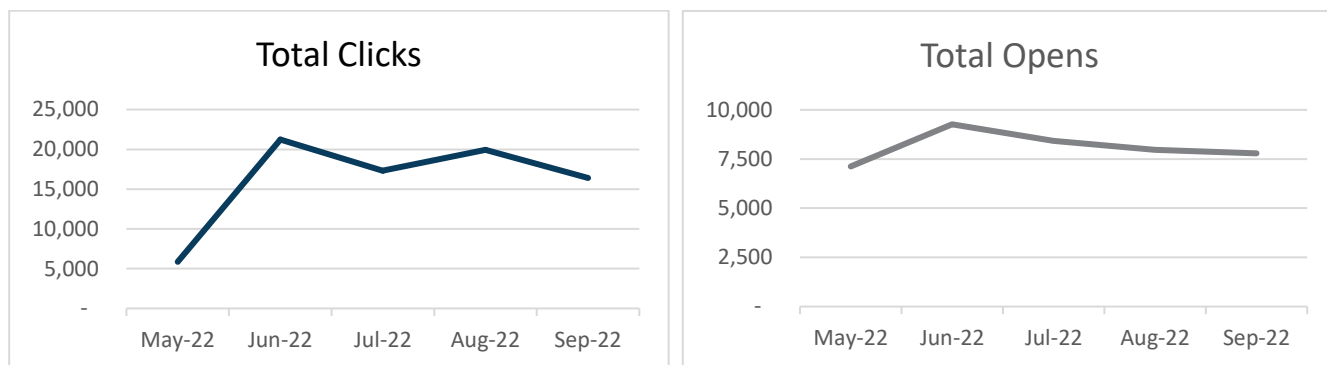
Job Role	Firms	Registered Individuals
Advising Multi-Tasker	3,019	3,375
Advisor (only)	2,336	14,440
Advisor with additional responsibilities	43	42
Desk Manager	249	1,664
Director/Partner without specific responsibilities	2,385	4,106
Functional Senior Manager	1,279	5,100
Fund Manager	142	582
Investment Director/Advisor	49	292
Investment Manager/Advisor	161	1,248
Line Manager (Only)	284	733
Senior Advisor	1,851	2,306
Grand Total		33,586



USING THE CONTACT DATA IN MAILCHIMP

The first client newsletter the Asset Manager sent had an initial delivery to 33,884 contacts, first measured 24 hours after sending. Results were excellent with on average 8,116 (29%) emails opened and average total clicks at 16,148. Ongoing campaign results are shown below.

ONGOING RESULTS



CONCLUSION

- The Asset Manager could have **employed someone full time** to add records to their limited database, one by one. That person could then spend time trying to enhance the contact data with additional information from other sources. Having done all of that, then they would need to try and regularly maintain it. Some key questions to ask when building a contact database:
 - How good, bad, or indifferent is the current contact data? **How do you really know?**
 - How much would it **cost to employ someone** to obtain and then maintain the data?
 - How much would the **outsourcing cost be by comparison?**
- Autus listened to the Asset Manager's requirements and worked with them to **define a target market** of Firms and Registered Individuals that would be receptive to their proposition. Autus provided **33,586** contact records with **email addresses** initially enabling a step-change in direct marketing capability for the Asset Manager. After the initial mailing, an average of 28,019 emails were sent in subsequent campaigns.
- The average number of **emails opened was 8,116 (29%)**, with average **total clicks at 16,148**. A fantastic result and testament to the message content as well as accuracy of the contact data. Unsubscribe rate was less than 5% from 6 mailings. Bounce rate average was less than 7%.
- The Asset Manager has been so impressed with the campaign results that they are going to sign a 3-year deal for monthly supply of Loadata. This will ensure that they always have up to date contact information for marketing campaigns. Loadata monthly can be switched to quarterly Validata (cleansing, enhancing existing data and new record supply) at any time during the contract term, at no extra charge.