

Prisma Campaigns

Marketing Orchestration Tool

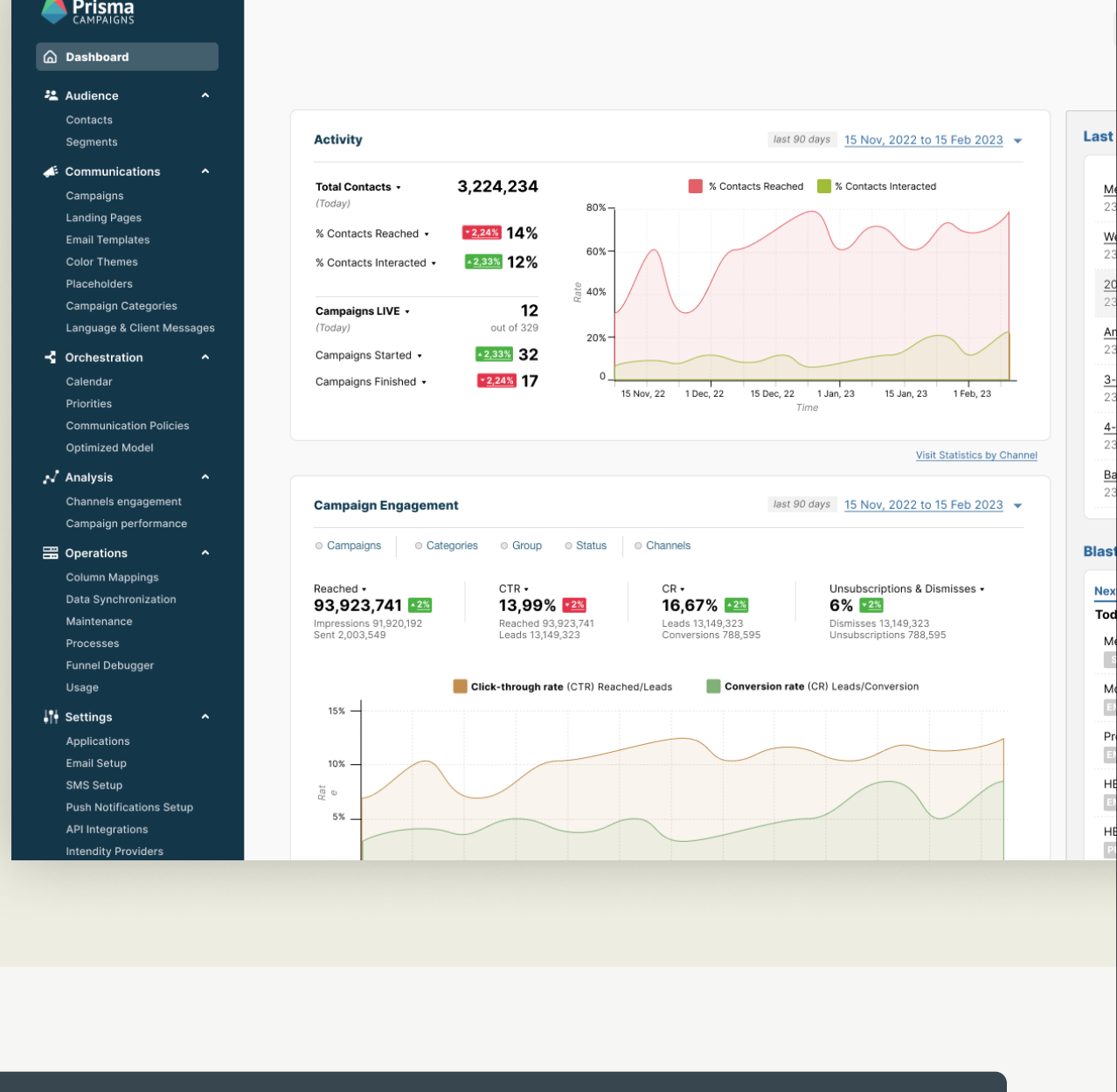
What is Prisma Campaigns?

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.



Data Analysis

A new feature from scratch to the final solution

Challenge

Marketing campaigns performance analysis is a keystone of improving communication strategies. Providing this type of information on the platform allows our customers to improve their marketing strategy executions and control over their communications.

Goal

Allow customers to explore historical and real-time marketing campaign data to draw conclusions about performance.

Solution

Build an Analytics screen where users can explore and visualize marketing campaigns performance (KPIs) on different time ranges and in real-time. The screen would allow customers to gather conclusions about their Marketing Campaign strategies.

Target Audience

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

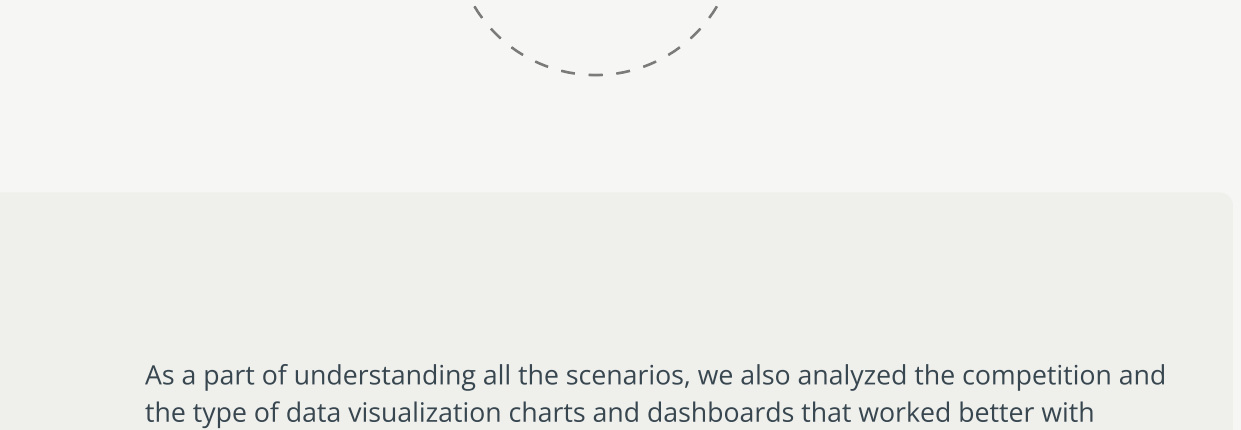
Data Analysts.
Responsible for analyzing data and providing insights and recommendations to improve marketing performance.

Summary

One of the most important things in 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.

In our case, we gather all the information from our customers, ideate a solution, and after a couple of iterations, we moved to implementation.

Here you will see a quick view of the process.



Research / Define

During this stage, we focused on gathering all the user's needs and motivations through different research and observation methods (quantitative and qualitative).

- We started by doing user interviews and surveys to understand:
- What type of KPIs do our customers use to measure campaign success
 - How often do our customers measure results on communications
 - Others

In tandem, we analyzed all communications and requests our customers made through Support channels to understand their current pains in reviewing and taking conclusions related to their campaigns.

As a part of understanding all the scenarios, we also analyzed the competition and the type of data visualization charts and dashboards that worked better with marketing campaign KPIs.

In summary, some of the relevant data they were looking for to answer about their campaigns were:

- What type of communication had more success
- How the users behaved on the campaign, visits, conversions
- Measure qualitative and quantitative differences between one campaign to another
- What type of behaviors customers had based on:
 - Time the blast was scheduled;
 - Device usage
 - Demographic/Customer data

Ideate

The first few sketches were exploratory on how to organize the type of information we were expecting to collect, as well as understand and highlight those which were relevant.

After a few iterations, we began doing low-fidelity sketches to prepare a presentation deck and start the validation process with internal stakeholders and customers.

The validation process involved presenting the possible solutions to evaluate if there was any missing data that we were missing, and if the information shown was relevant enough to help make better decisions on new campaigns.

The user can easily select the campaign name and the time range to display and review the corresponding statistics

Started the screen by displaying **Daily Visits** data to show how many users are consuming the marketing campaign on a daily basis and what channel they are using to interact with the campaign.

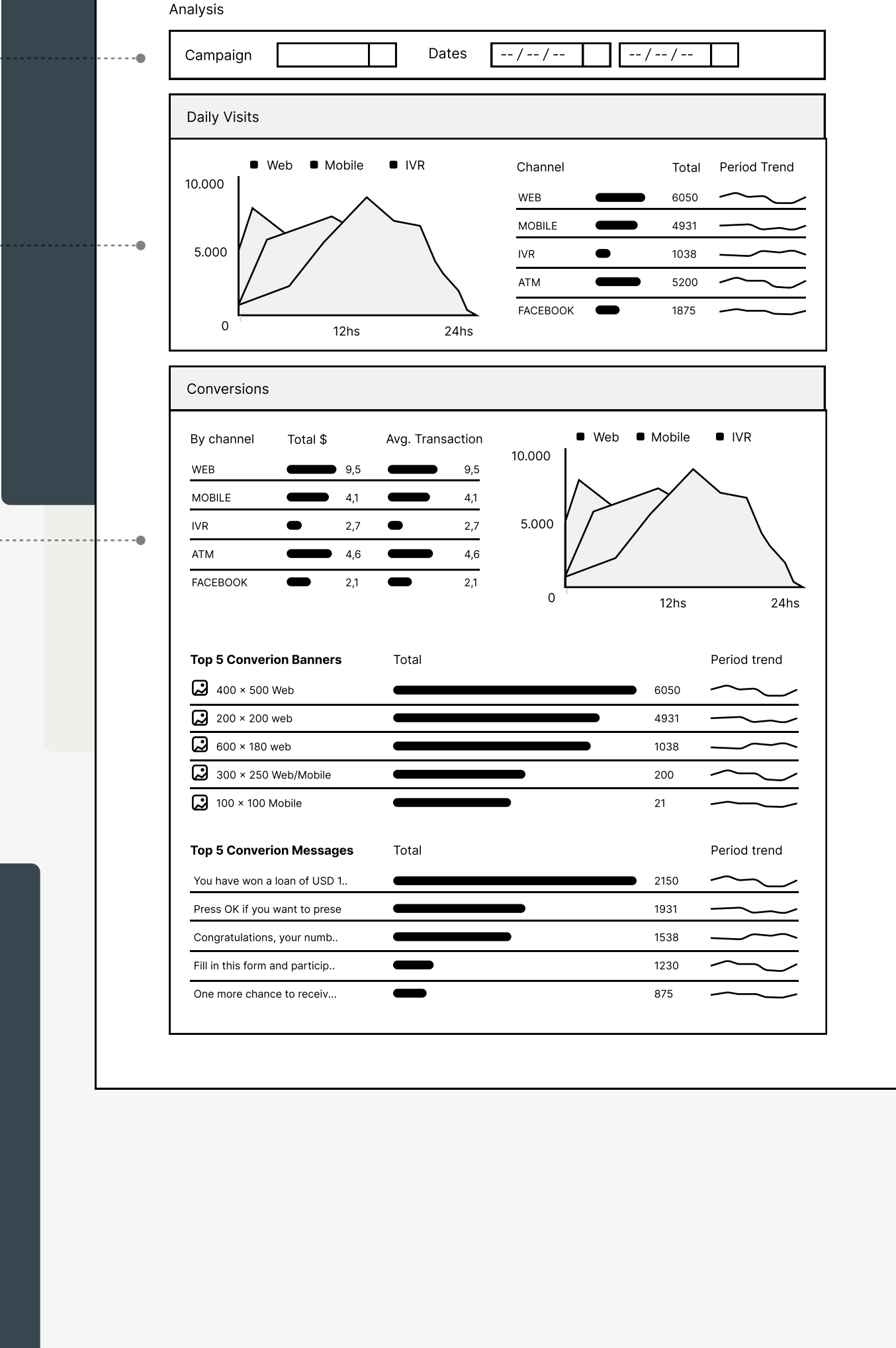
On the left side, we display an area chart with the series of # Customers vs day how users are interacting with the campaigns throughout the day.

In the right table, we show data sorted by Channels to identify how users are interacting with campaigns, including # Customers by channel and the trend for each channel.

Following the Daily Visits panel, we continued with how Customers are converting on the Campaign, and how that translates into revenue & goals for our Users.

The information is divided into:

- Results separated by channel and time of the day users converted
- Ranking of the banners (Inbound channel) that created more conversions and conversion trend
- Ranking of the Emails (Outbound channel) that created more conversions.



Some of the feedback provided by our Customers, as well as internal stakeholders, was:

- Difficult to understand how each channel behaves
- Also noticed that campaigns might have only one channel turned on, and this layout might look very weak in those cases.
- Lack of general statistics per channel.
- Hard to quickly see how successful the campaign is and whether new strategy decisions need to be made before it continues.
- Missing non-conversion data such as views, deliveries, and interactions.
- No personalization data statistics

Validation #1

Once we had low-fidelity mockups, we proceeded to conduct guided interviews with our customers to understand if we were on the right track.

Some of the feedback provided by our Customers, as well as internal stakeholders, was:

- Difficult to understand how each channel behaves
- Also noticed that campaigns might have only one channel turned on, and this layout might look very weak in those cases.
- Lack of general statistics per channel.
- Hard to quickly see how successful the campaign is and whether new strategy decisions need to be made before it continues.
- Missing non-conversion data such as views, deliveries, and interactions.
- No personalization data statistics

New iteration

After finishing all the interviews, surveys and receiving feedback, a new low-fidelity iteration was made to evaluate.

- Some of the priorities were:
- Highlight campaign performance, running status, views, and leads.
 - Organize statistics by channels, in silos, since it is very uncommon to have several channels turned on.
 - More granularity in campaign statistics, such as Reached vs Leads

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

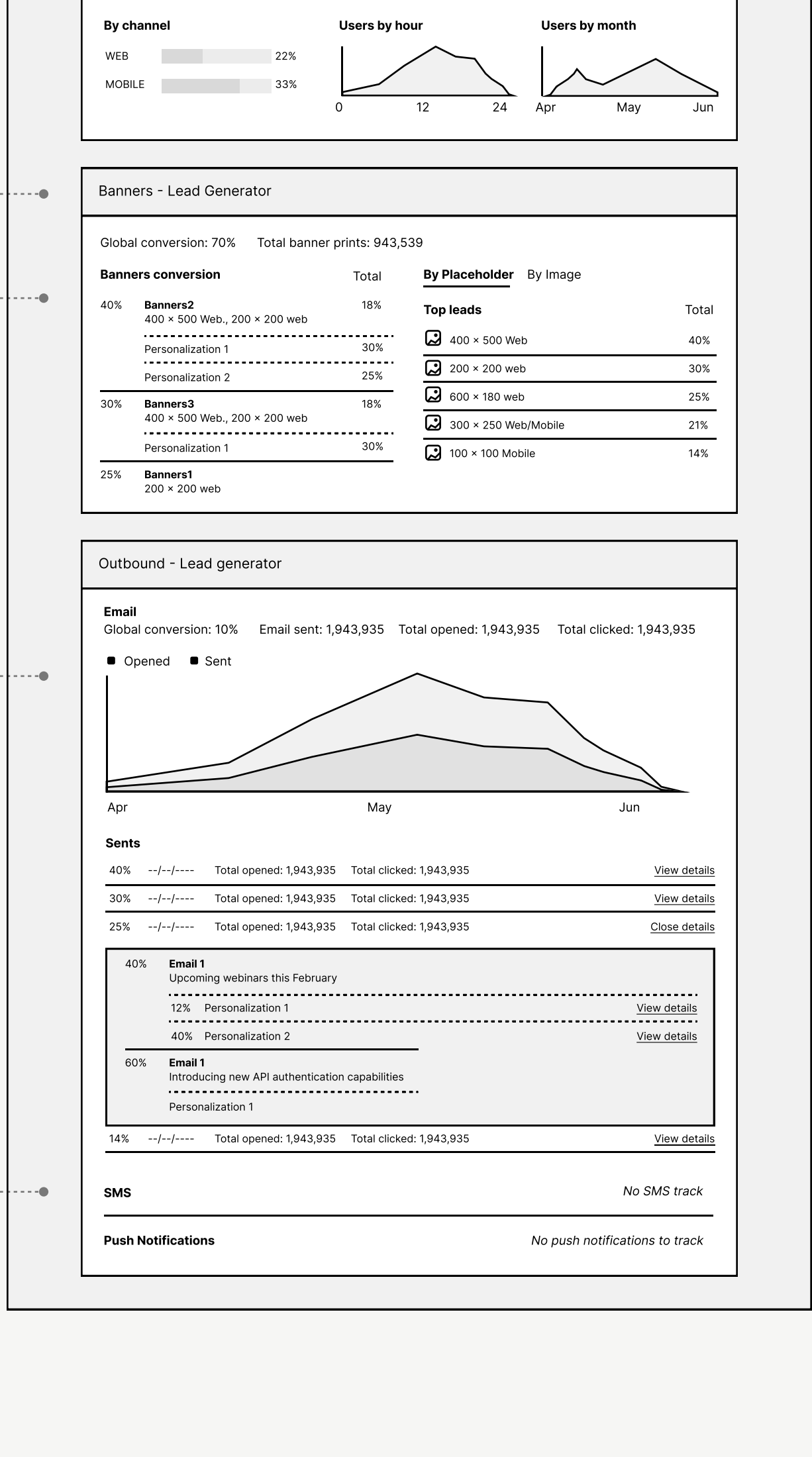
Channels are now separated on different panels to support more data to review and analyze.

The information in the banner section involves:

- 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 showing blasts sent during the selected period, and their performance (opened vs sent)

Below 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.



Validation #2

After presenting the new mockup to internal and external stakeholders, all concerns were met and solved. The only suggestion we received before moving to high-fidelity mockups was:

- Given the possibility of multiple channels, the screen can potentially be pretty long if channel statistics are displayed on panels altogether.

Final Solution

For the final version, we made several changes to improve showing the campaign performance, as well as including all the general and channel-based information available to help customers drill down on details.

Regarding the Channel display, we added a tab control allowing to swap between channels easily and avoiding making a long page with all channels stacked. Each channel tab item appears depending on whether or not it is used in the campaign.

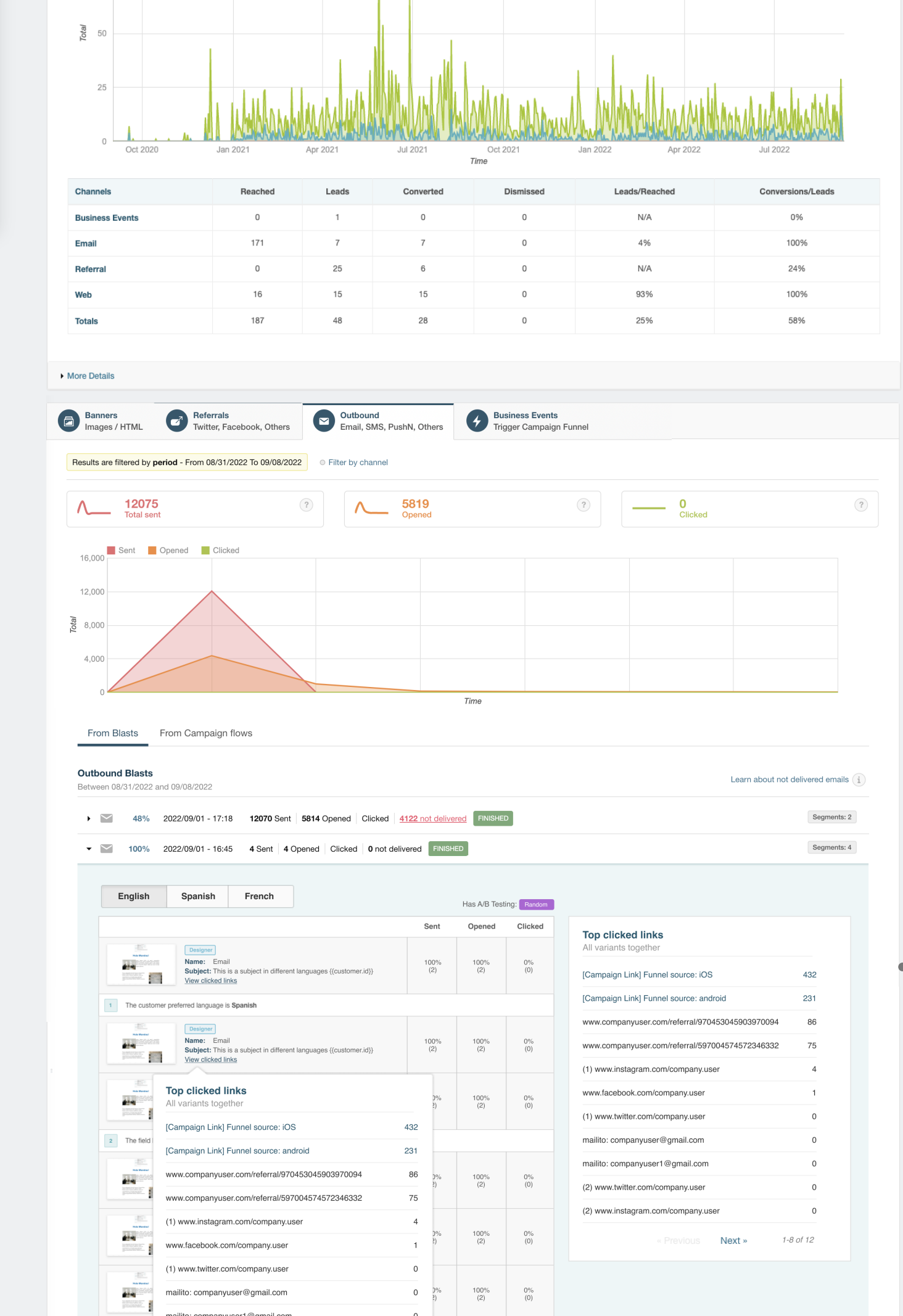
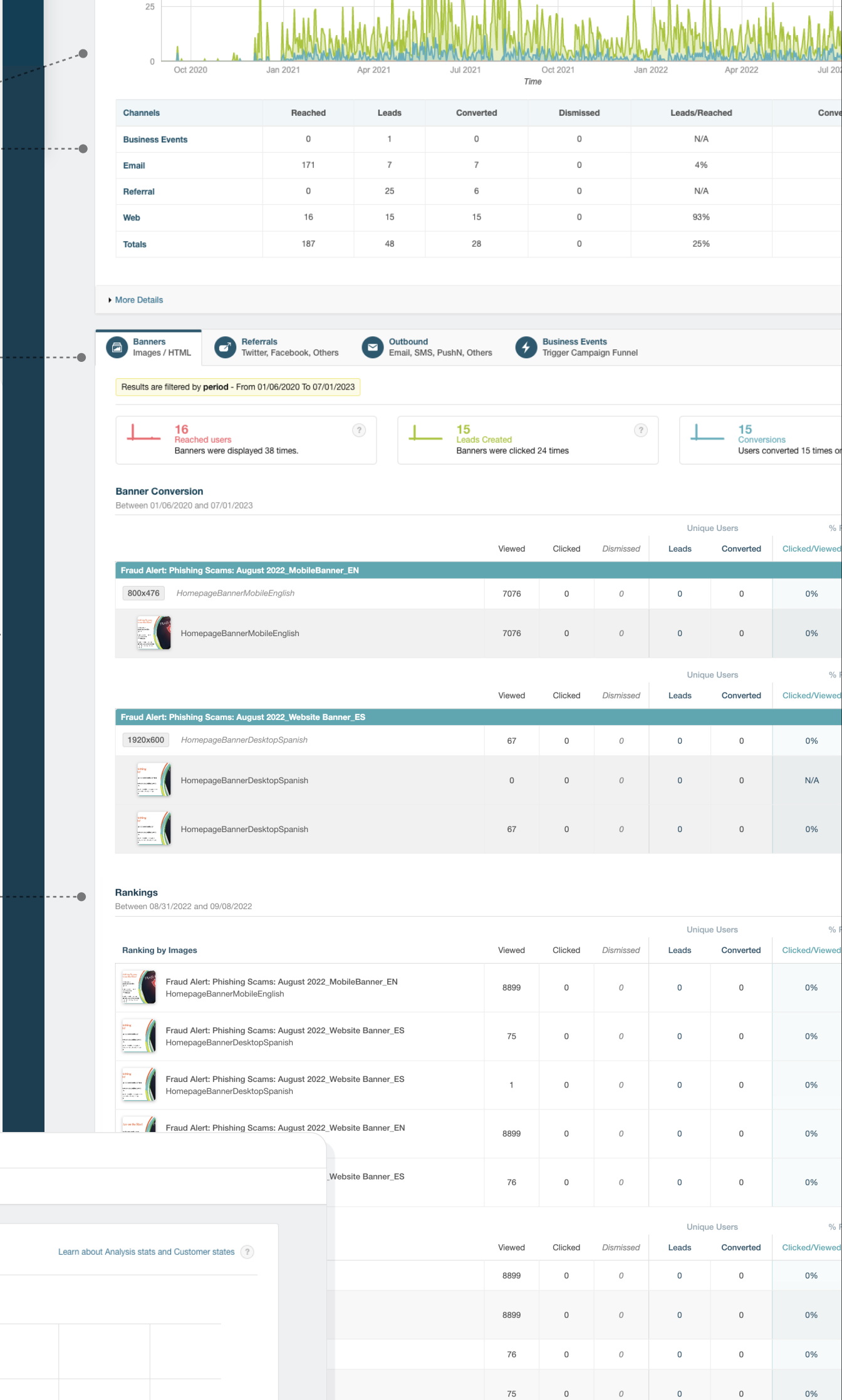
Area chart showing campaign behavior through reached, engaged, leads, conversions, and dismisses

Below we show raw data in a table format

Channels are shown on different tabs to optimize screen space. Tabs items are shown if the channel is turned on.

Listing banners' performance separated by placeholder and A/B testing

Ranking top Banners by content and placeholders



Blast data aggregation to visualize customers' behavior during this period.

Showing all content variations from personalizations and a/b testing to different languages, for each blast.

Prisma Campaigns

Marketing Orchestration Tool

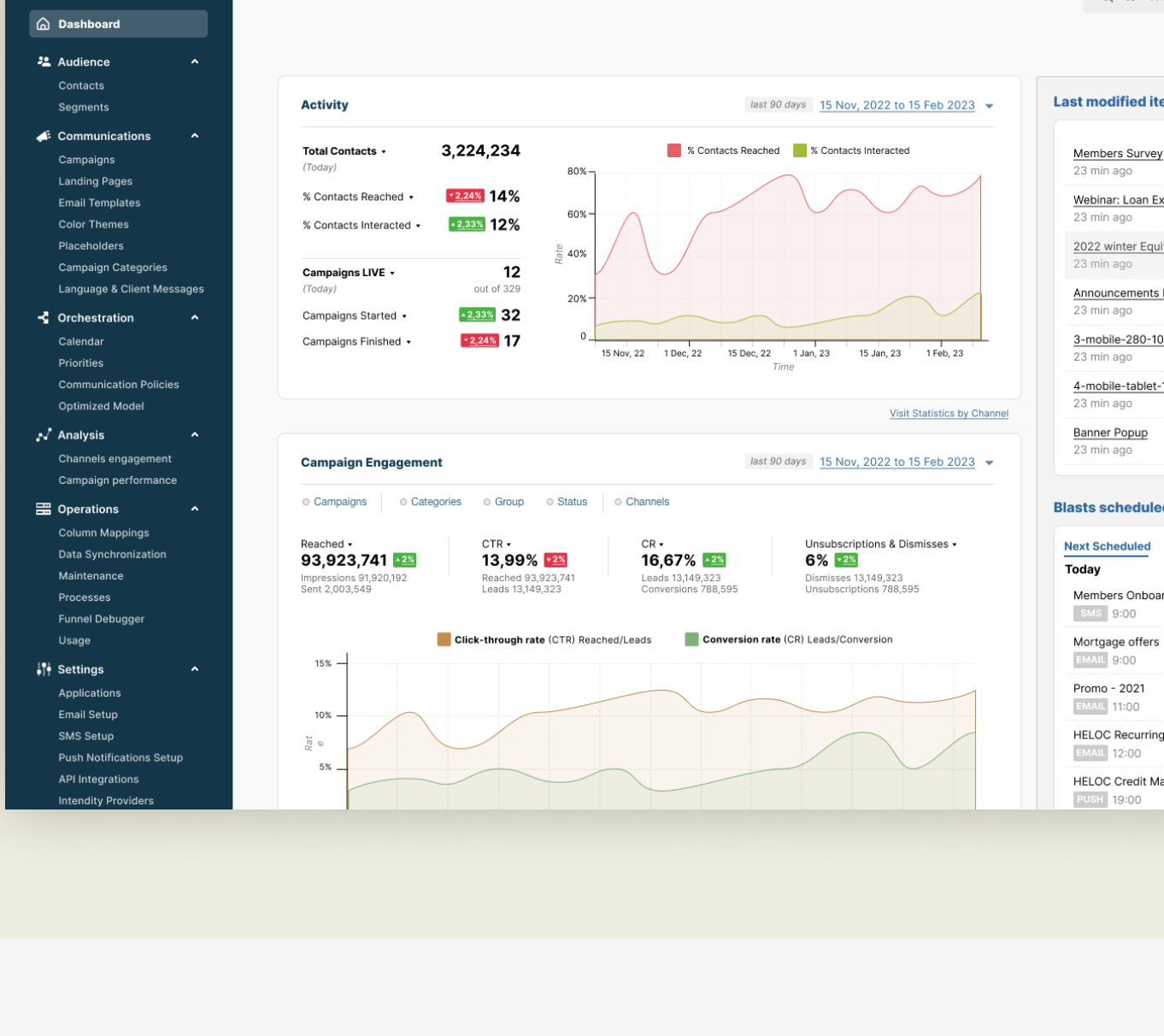
What is Prisma Campaigns?

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.

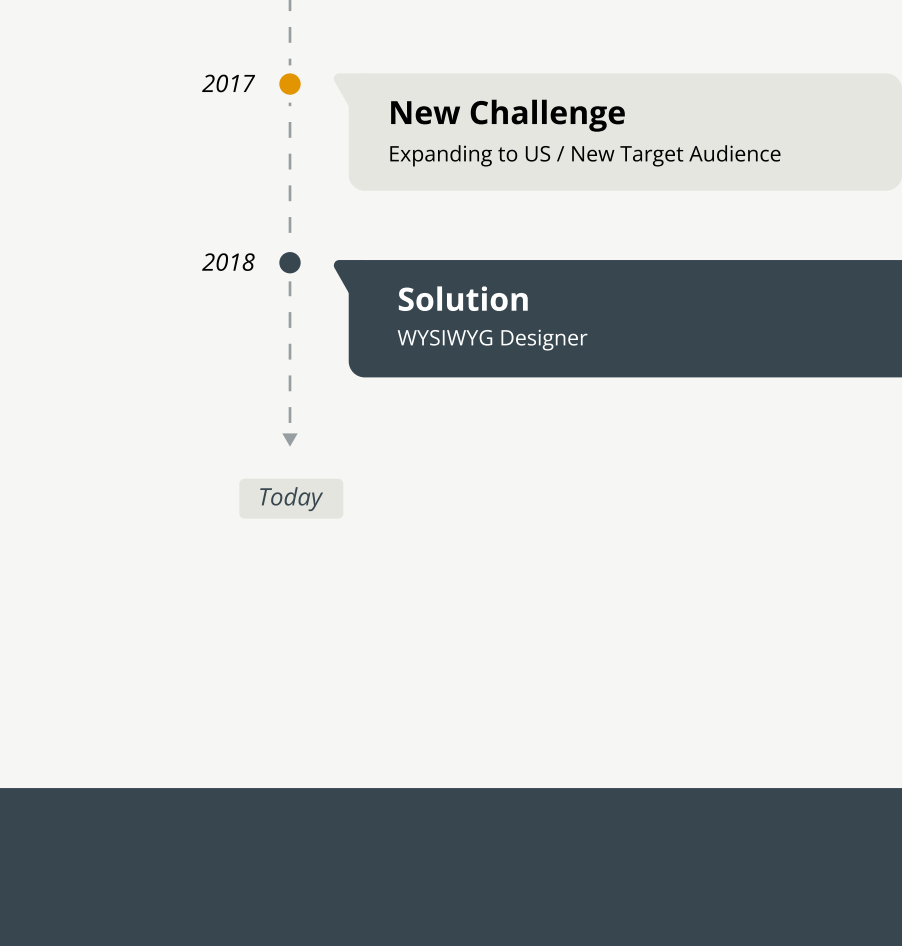
Summary

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

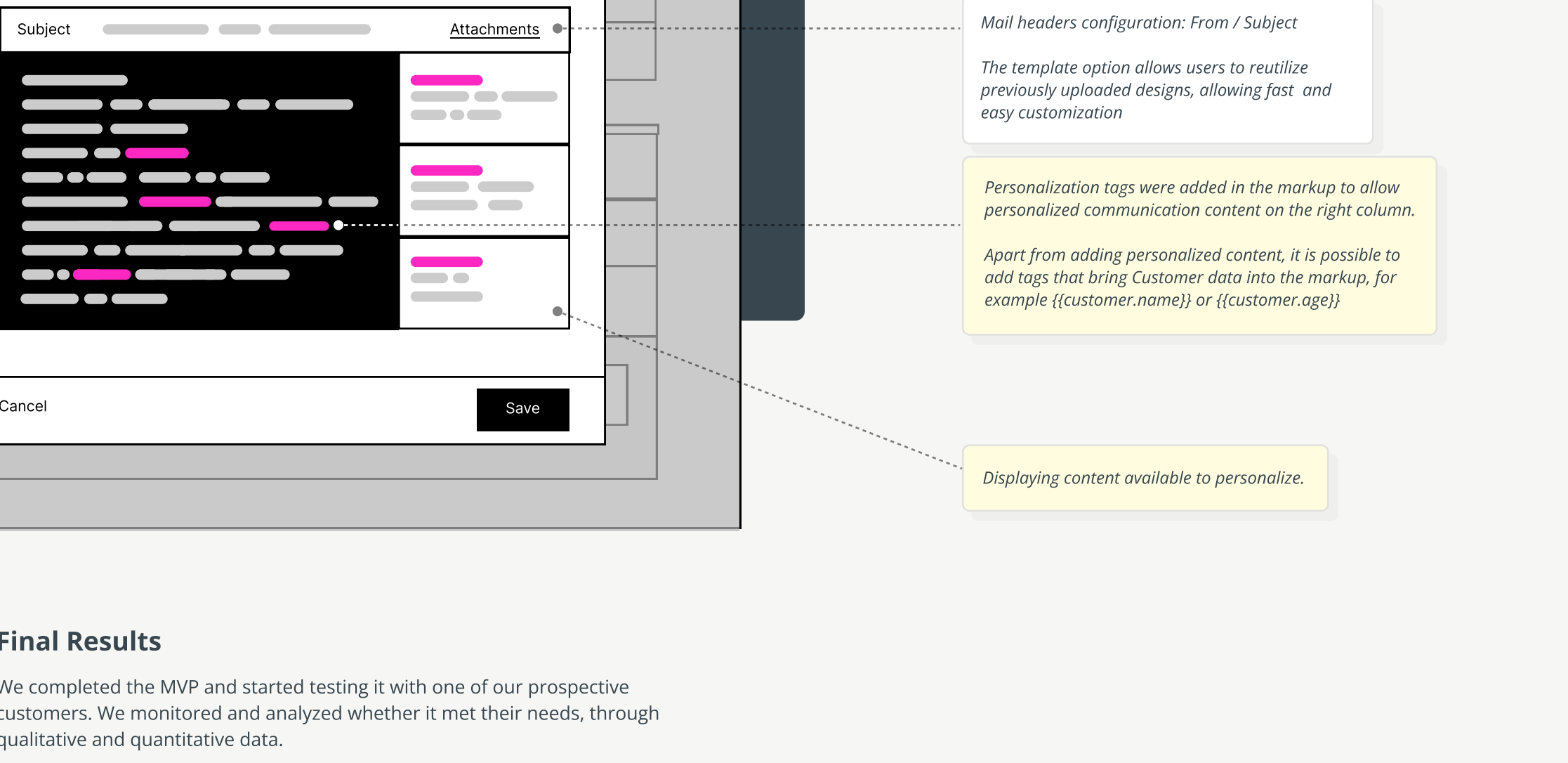
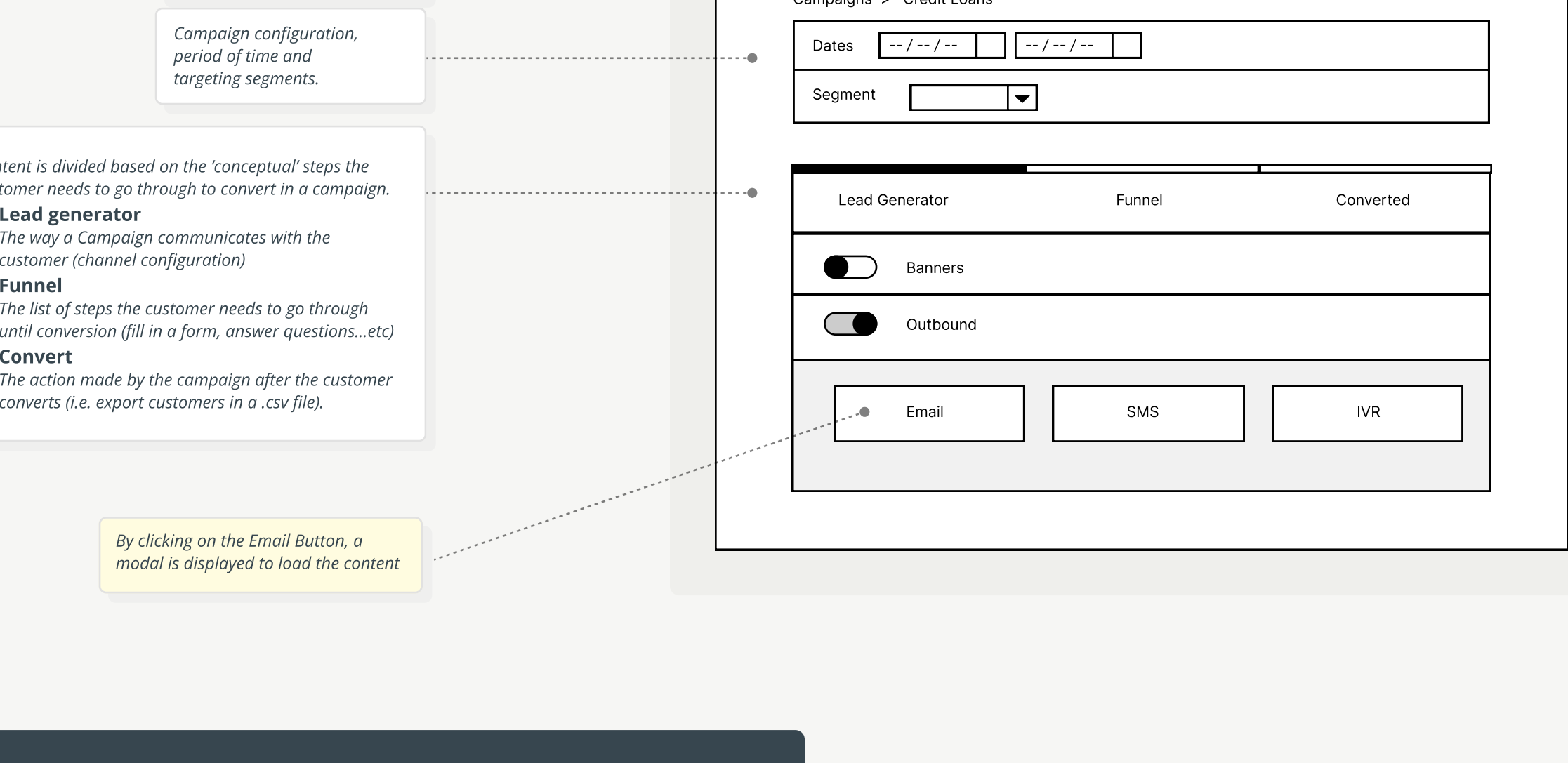
Allow uploading communication assets (banners, emails, popups...), and integrate with existing customer data to send relevant and personalized communication.

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

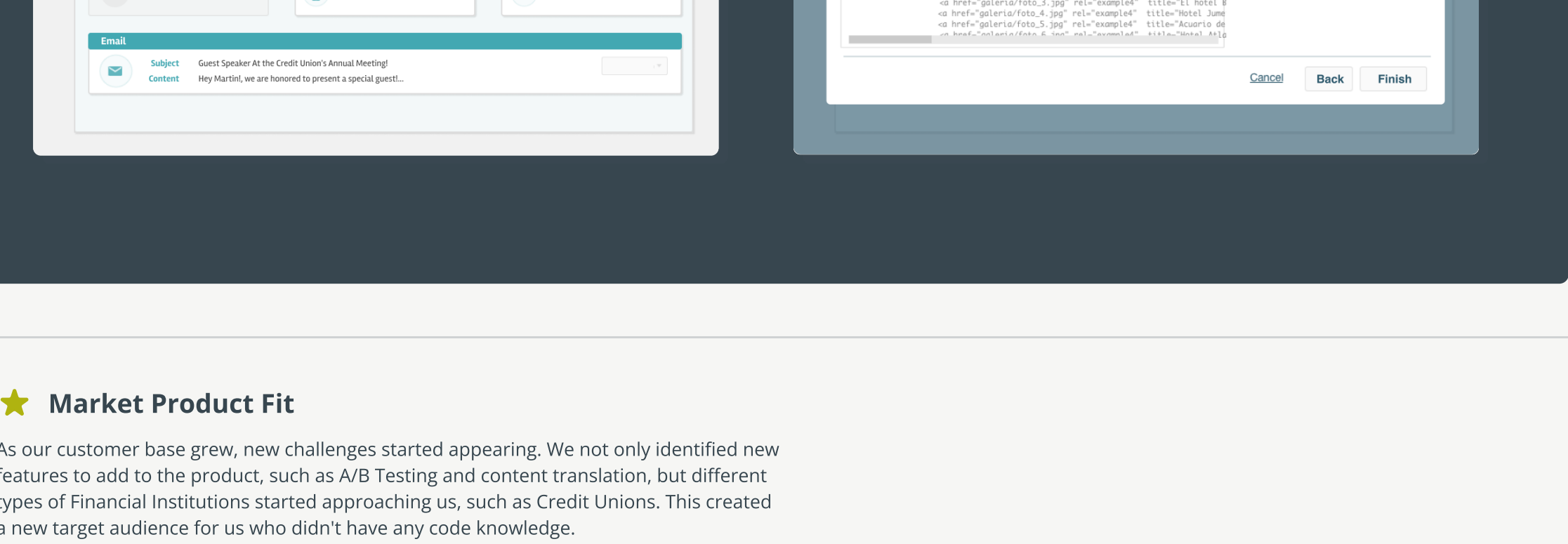
Marketing specialists. Ideate and create communications and assets to send to their customers through Marketing Campaigns. They have medium to high technical knowledge (HTML).



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.



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.

