TIFFANY HOLCOMB

PROJECT MANAGER & BRAND STRATEGIST

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NEW PRODUCT ONBOARDING IMPLEMENTATION

Project Kickoff

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OVERVIEW

Automated client communication of applicable information pertaining to recently new products or services adopted. Increase awareness of offers consistent with market research related to client profile throughout the twelve months following product or service adoption, to maximize cross-selling opportunities.

OBJECTIVES

- Raise product/service adoption from an average of 1.5 to 3 products per household
- Boost brand awareness and loyalty
- Increase client communications and expand communication channels

SCOPE

IN SCOPE

- Email, direct mail, and SMS marketing communication channels
- Automated file transfer to direct mail, email, and SMS platforms secure FTP
- Exclusion of adopted products and services prior to communication sends
- UAT and validation of variable data cross platforms
- Development of advanced reporting and analysis strategy

OUT OF SCOPE

- Incorporation of CRM
- Social media messaging/communication
- Virtual chat communication

IMPACT

ORGANIZATION

- Process automation – Configuration from manual to automated process
- Reduction of errors and inaccuracy
- Increase of staff capacity
- Decrease of inbound support calls

CLIENT

- Enhanced awareness of product and service offering
- Upgraded client experience and communication

MEASURES OF SUCCESS

- 2% increase of client retention rate
- 3.5% increase in average conversion rate
- Increase communication Open Rate from 18.56% to 21.25%, CTR from 2.15% to 2.75%, and Unsubscribe Rate from 0.32% to 0.22% within 180 days of implementation

RISKS

- Data sources for advanced reporting and current market research software are in accurate and out of sync
- Security breaches of client data could result in reputation risk

GET TO KNOW THE PROJECT TEAM

TIFF HOLCOMB
Project Manager II

"Strive not to be a success, but rather to be of value."–Albert Einstein

DANIEL LEMON
Data Scientist

"You do not find the happy life. You make it." – Camilla Eyring Kimball

LITA GARCIA
Ethics & Compliance Programs Manager

"Impossible is for the unwilling." – John Keats

FATIMA MUHAMMAD
Digital Marketing Consultant

If it matters to you, you'll find a way." – Charlie Gilkey

TATYANA SMITH
SVP, Client Success

"Whatever you are, be a good one." – Abraham Lincoln

JARED JOHNSON
QA Manager

"Be yourself; everyone else is already taken." - Oscar Wilde

SAM WHITMORE
Project Analyst

"You never fail until you stop trying." - Albert Einstein

LI HONG
VP, Digital Transformation

"My mission in life is not merely to survive, but to thrive." – Maya Angelou

TEAM ICEBREAKERS

Introduction of each team member:

- ➤ Preferred Name
- ➤ Project Role
- ➤ Trivia (i.3. hobbies, interesting experiences, personal details, etc.)
- ➤ Default Communication Style & Preferences

"Hi there, I am Tiff!

I am going to be the Project Manager for the New Product Onboarding Project.

I would love to write a book. I have a concept and outline started, and hope to at some point start working on content development.

By default, I typically communicate via email or the PMIS, they are easy to refer back to. However, I also want to ensure effective communication with the project team and stakeholders, so I adapt to their preferred communication style."

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TEAM OPERATING AGREEMENT

- Respect the Team
- Value Expertise
- Be Aware of Priorities - Your Priorities Are Not Priorities for Other Team Members
- Minimize Distractions During Meetings
- Be An Active Listener
- Ensure Punctuality and Be Prepared
- Follow Agreed Upon Conflict Resolution Process
- Attendance - If Unable to Attend Meetings, Provide Status Updates in Advance, or Assign a Representative

- Follow the Decision-Making Criteria and Process
- Challenge Yourself & Your Fellow Team Members
- Communicate Effectively
- Embrace Change and Opportunities
- Be Solution Focused - When an Issue or Risk Arises Consider and Recommend Solutions or Mitigation Techniques
- Remember the Project Scope
- Capture Lessons Learned

PRIORITY OF COMMUNICATION METHODS

1. PMIS Updates
2. Email
3. Messenger
4. Phone
5. Text

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STATUS MEETING CADENCE

- Status Updates
  - Work Completed Since Previous Meeting
  - Work to Be Completed Prior to Upcoming Meeting
  - Are There Team Members That Need Help?
- New Risks or Issues
- Change Requests
- New Opportunities or Benefits Gained
- Upcoming PTO/Holidays
- Open Discussion

OPEN DISCUSSION