

Case Study

Bryan Mannix
RAVENPACK

Contents

| | |
|---|-----------|
| Introduction..... | 1 |
| 1. CRM Data Management | 2 |
| 1.1 Cleansing and Deduplicating Customer Data | 3 |
| 1.2 Lead Scoring System Using Multiple Data Sources..... | 3 |
| Why This Approach Works | 7 |
| 2. Workflow Automation: Client Onboarding Process | 7 |
| 2.1 Proposed Workflow Using Zapier or CRM Automation | 7 |
| 2.2 Key Configuration Details..... | 8 |
| 3. Reporting Process Improvement | 8 |
| 3.1 Data Sources and Their APIs..... | 8 |
| 3.2 Data Transformation and Cleaning | 8 |
| 3.3 Visualisation and Reporting..... | 9 |
| 3.4 Implementation Timeline and Potential Challenges | 10 |
| 4. Potential Challenges and Mitigation Strategies | 10 |
| 5. Time Savings and Data Accuracy Improvements | 11 |
| Conclusion | 11 |

Introduction

The following document provides a structured approach to overhauling RavenPack's marketing operations from the ground up. It begins by outlining a **CRM Data Management** strategy to establish a single source of truth across departments. It then explains how to develop a **Lead Scoring System** encompassing both behavioural inputs (for example, email opens and webinar attendance) and firmographic data (such as organisation size and region).

Subsequently, this document presents a step-by-step guide for **Workflow Automation**, highlighting how tools like Zapier or native CRM functionalities can streamline client onboarding and ongoing engagement. It then addresses **Reporting Process Improvements** aimed at consolidating data from disparate sources into automated dashboards, enabling multiple stakeholders to access timely insights.

Finally, it explores potential challenges—ranging from regulatory constraints to data quality issues—and details how each may be mitigated through strategic planning and close collaboration with internal teams such as Finance and Data Science. Throughout, particular emphasis is placed on long-term efficiency and sustainable growth, ensuring that RavenPack remains at the forefront of AI-powered finance solutions.

By adopting the recommendations outlined herein, RavenPack's marketing team will strengthen its analytical foundation, achieve closer alignment with Sales and Finance, and ultimately establish a scalable framework to support the organisation's ambitious GenAI and SaaS ventures

1. CRM Data Management

1.1 Cleansing and Deduplicating Customer Data

In a FinTech environment handling high-value data, accuracy and compliance are paramount. The recommended approach is as follows:

1. **Data Audit and Field Standardisation**
 - **Inventory of Existing Fields:** Identify all relevant fields (for instance, email address, telephone number, company name, market segment, compliance flags).
 - **Documentation of Data Standards:** Prepare a data dictionary detailing field formats (for example, telephone numbers with country codes, standardised job titles).
 - **Compliance Considerations:** Ensure adherence to GDPR and other applicable financial regulations (for instance, MiFID II), particularly for personal data.
 2. **Automated Validation and Deduplication**
 - **CRM Rules and External Tools:** Utilise CRM deduplication modules or third-party solutions (such as DemandTools or Ringlead) to identify and merge duplicate records.
 - **Financial-Specific Validation:** Where relevant, cross-reference records with compliance or KYC (Know Your Customer) databases to reduce inaccuracies.
 3. **Continuous Data Quality Monitoring**
 - **Scheduled Deduplication Checks:** Conduct monthly or quarterly audits to merge or cleanse flagged records.
 - **User Training:** Provide training to the Marketing, Sales, and Finance teams on data-entry best practice to ensure consistency.
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1.2 Lead Scoring System Using Multiple Data Sources

Overview

RavenPack's extensive data environment—including web analytics, sophisticated data feeds, product usage logs, and compliance checks—presents an excellent foundation for a rigorous lead scoring system. Rather than arbitrarily assigning point values, this methodology leverages **empirical analysis** and **domain expertise**, ensuring that the scoring process aligns with genuine conversion patterns.

The following **point-based scoring framework** offers clear thresholds for Marketing and Sales alignment and incorporates a **data-driven approach** for refining point allocations over time.

1) Scoring Dimensions

1. Firmographic and Demographic Fit

- **Scope:** Company size, financial segment (hedge fund, bank, asset manager), and job role (for example, Portfolio Manager or Analyst).
- **Significance:** Certain firmographic attributes correlate with higher purchasing potential for RavenPack's GenAI and SaaS products. Larger hedge funds, for instance, often represent a more substantial opportunity than smaller consultancies.

2. Engagement Data

- **Scope:** Webinar registrations, website page visits to product-focused content, whitepaper downloads, and email opens or clicks.
- **Significance:** Higher engagement typically signifies a stronger inclination to explore RavenPack's offerings.

3. Product Usage or Trial Data

- **Scope:** Frequency of logins, types of features accessed, duration of sessions during a GenAI or SaaS trial.
- **Significance:** Leads who frequently test advanced product features are more likely to progress rapidly towards a purchase decision.

4. Compliance Status

- **Scope:** Completeness of KYC (Know Your Customer) data or other financial regulatory requirements.
 - **Significance:** In the heavily regulated financial sector, incomplete compliance documentation can halt or invalidate potential sales conversations.
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2) Point Assignments

To translate these dimensions into quantifiable metrics, the following **illustrative point values** are proposed:

- **High-Intent Actions**

- *Requesting a Bigdata.com Demo: +30 points*
 - *Rationale:* A direct demo request strongly indicates readiness to purchase.

- **Premium Content Consumption**

- *Downloading finance-specific AI case studies: +10 points*
 - *Rationale:* Demonstrates deeper interest in RavenPack's financial expertise.

- **Email Engagement**

- *Opening Marketing Emails: +2 points*
- *Clicking Through to Key Web Pages: +5 points*
 - *Rationale:* Reflects moderate interest in RavenPack solutions.

- **Negative Signals**
 - *Unsubscribes, Hard Bounces, or 30+ Days of Inactivity: -10 points*
 - *Rationale:* Decreasing or withdrawn engagement suggests a diminished likelihood of conversion.
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3) Scientific Basis for Point Allocations

To ensure that point values reflect genuine conversion likelihood rather than subjective estimations, RavenPack employs **historical data** and **predictive analytics**:

1. **Historical Conversion Analysis**
 - Review behavioural patterns of leads that progressed to closed-won opportunities. For instance, if the majority of leads requesting a demo subsequently convert, that behaviour warrants a significant point value.
2. **Machine Learning or Statistical Models**
 - Use techniques such as logistic regression or predictive scoring tools (for example, Salesforce Einstein, HubSpot's AI, or custom ML models) to ascertain the correlation between specific attributes—such as firm size or product trial usage—and revenue outcomes.
3. **Pilot Testing and Calibration**
 - Implement an initial scoring model over a defined period (for example, one financial quarter), then compare projected outcomes against actual conversions. Adjust point values accordingly if certain behaviours are over- or undervalued.
4. **Ongoing Feedback Loop**
 - Integrate input from Sales and Data Science teams (for instance, if “MQLs at 60 points are insufficiently prepared” or if new product behaviours emerge that strongly correlate with purchases) to continuously refine the model.

4) Thresholds and Alerts

A **threshold-based** system ensures that high-potential leads receive the appropriate level of attention at the right time. At RavenPack, the following initial benchmarks provide a starting framework for classifying leads, with the understanding that these figures will be **adjusted over time** as more real-world data is collected.

1. **Marketing Qualified Leads (MQL)**
 - **Threshold:** 50 points or higher
 - **Action:** Leads meeting or exceeding 50 points are flagged as “MQL,” prompting marketing-led follow-up or automated nurturing sequences.
 - **Rationale:**
 1. **Baseline Conversion Cues:** Historical trends in B2B and FinTech contexts suggest that leads possessing roughly half of the maximum possible score often display emerging, yet still formative, buying signals.

2. **Validation Phase:** Marketing can use this stage to validate interest—through targeted content, initial phone calls, or compliance checks—before devoting sales resources.
 3. **Flexibility:** Depending on actual conversion data (e.g., if 50-point leads prove consistently underqualified), this threshold can be adjusted upward or downward.
2. **Sales Qualified Leads (SQL)**
- **Threshold:** 70 points or higher
 - **Action:** Leads that surpass 70 points transition to “SQL,” triggering immediate notifications to Business Development or Sales Development Representatives (BDRs/SDRs).
 - **Rationale:**
 1. **High-Intent Behaviour:** Reaching 70 points typically indicates engagement with higher-value activities (such as demo requests or multiple content downloads), which correlates strongly with eventual purchase decisions.
 2. **Efficient Resource Allocation:** By designating leads with a robust score as SQL, Sales invests time where it is most likely to yield returns.
 3. **Empirical Calibration:** As actual conversion data is collected, if 70-point leads do not consistently progress, RavenPack can recalibrate these thresholds or reassign point values.

5) Continuous Optimisation

1. **Feedback Loop with Sales and Data Science**
 - **Sales Check-Ins:** Compare MQLs and SQLs against actual conversions; refine the scoring structure based on empirical results.
 - **Advanced Analytics:** Incorporate new data signals (for instance, advanced Bigdata.com usage metrics) should they demonstrate a verifiable link to conversion rates.
 2. **Correlating Scores with Key Metrics**
 - **Conversion Rates:** Do leads with higher scores convert at a significantly elevated rate?
 - **Revenue Impact:** Are top-scoring leads associated with larger deal sizes or expansions?
 - **Retention:** Track churn or subscription renewals to adjust the scoring model for long-term accuracy.
 3. **Model Iteration and Documentation**
 - Maintain a version history of scoring updates, recording justifications for each change. This ensures organisational awareness and continuity in case of staff transitions.
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Why This Approach Works

- **Comprehensive:** Assesses who the lead is (firmographics), what they do (engagement and trials), and their compliance readiness.
- **Objective and Data-Driven:** Allocations are anchored in historical evidence, refined by predictive analytics.
- **Responsive:** Feedback loops enable dynamic adjustments, ensuring the scoring system accurately reflects market conditions and buyer behaviour.
- **Clear Handoffs:** Predefined thresholds guarantee that Marketing and Sales understand exactly when a lead is ready for deeper engagement.

By adopting this evidence-based, point-centric lead scoring model, RavenPack can effectively pinpoint and advance its most valuable prospects, leading to improved conversion rates, stronger client relationships, and more efficient resource allocation.

2. Workflow Automation: Client Onboarding Process

Given RavenPack's clientele—hedge funds, asset managers, and other finance-centric organisations—**high-touch and compliant onboarding** is essential. A well-designed automation strategy ensures a streamlined initiation, fostering enduring relationships and positioning RavenPack's offerings for long-term success and potential upselling.

2.1 Proposed Workflow Using Zapier or CRM Automation

1. New Client Contract Signed

- This is the starting point of the onboarding process.

2. CRM Trigger: Create or Update the Client Record

- Automatically create or update client details in the CRM.

3. Send Automated Welcome Email

- Personalised email including product access links, support information, and documentation.

4. Create Onboarding Tasks (in CRM / Project Management Tool)

- Schedule a Kick-off Call.
- Assign an Onboarding Specialist.
- Provide Compliance/KYC Documentation if required.

5. Finance System Integration

- Update subscription status, billing details, or trial parameters.

6. Client Journey Tracking

- Monitor usage of training modules or tutorials.
- Trigger follow-up emails if engagement levels decline.

7. CRM Status Update: “Onboarding in Progress”

- Notify the Onboarding Specialist or Customer Success Manager (CSM) via Slack or email.

8. Checkpoints and Feedback

- Once tasks are complete, set the CRM status to “Onboarded”.
- Send a final “Welcome to RavenPack” email with next steps.
- Offer advanced training as appropriate.

2.2 Key Configuration Details

- **Tool Integration:** Utilise Zapier or native CRM automations alongside project management systems (for example, Asana or Monday.com) to streamline task creation.
- **Compliance Checks:** Embed regulatory or legal milestones (for instance, AML checks) via CRM triggers.
- **Communication Templates:** Store dynamic email templates within the CRM or marketing automation platform to facilitate rapid personalisation.
- **Monitoring and Alerts:** Configure Slack or Microsoft Teams notifications for prompt intervention if an onboarding step stalls.

3. Reporting Process Improvement

3.1 Data Sources and Their APIs

- **CRM (for instance, Salesforce or HubSpot):** Lead, opportunity, and pipeline data.
- **Marketing Automation (for instance, Marketo or HubSpot):** Campaign performance and email metrics.
- **Website Analytics (Google Analytics or custom tracking):** Traffic data, conversions, and funnel metrics.
- **Financial Data Feeds:** Usage data for RavenPack’s services or Bigdata.com platform.
- **Advertising Platforms (LinkedIn Ads, Google Ads):** Cost, click-through rate (CTR), conversions, and cost per lead.

3.2 Data Transformation and Cleaning

1. **Automated Data Extraction**
 - Deploy Python scripts or third-party tools (for instance, Zapier, Fivetran, Airbyte, or AWS Lambda) to schedule data retrieval.
 - Ensure APIs have suitable permissions and adhere to rate limits.
 2. **Normalisation**
 - Standardise definitions (for example, “Cost,” “CPL,” “CTR”) across data sources.
 - Differentiate between various products (Bigdata.com subscriptions versus RavenPack feeds) for precise attribution.
 3. **Aggregation and Validation**
 - Store unified data in a central repository (Snowflake, BigQuery, or specialised data warehouse tools).
 - Implement validation checks (for example, verifying data volumes against expected benchmarks) to detect anomalies.
 4. **Data Enrichment (Optional)**
 - Append contextual firmographic details—such as AUM size or fund type—to enhance segmentation and analysis.
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3.3 Visualisation and Reporting

- **BI Tools:** Tableau, Power BI, Looker Studio (Data Studio), or Looker for dashboard creation.
- **Key Performance Indicators (KPIs):**
 - MQLs and SQLs by segment (hedge fund, asset manager, etc.)
 - Funnel conversion rates
 - Pipeline velocity and channel ROI
 - Engagement metrics tied to RavenPack’s GenAI or Bigdata.com platform

3.4 Implementation Timeline and Potential Challenges

| Phase | Duration | Activities | Challenges & Mitigation |
|---|-----------|--|---|
| Phase 1: Requirements & Data Source Identification | 1–2 Weeks | - Map out data sources - Confirm KPIs and metrics - Evaluate API feasibility | - API Rate Limits: Conduct data pulls during off-peak hours |
| Phase 2: Data Pipeline Build & Cleansing | 2–4 Weeks | - Set up connectors - Clean and normalise data - Establish data warehouse | - Data Quality: Incorporate robust validation checks |
| Phase 3: Dashboard Development & Testing | 2 Weeks | - Build dashboards in chosen BI tool - Conduct user acceptance testing - Document processes | - User Adoption: Provide comprehensive training sessions |
| Phase 4: Deployment & Ongoing Optimisation | Ongoing | - Schedule automated weekly reports - Seek stakeholder feedback - Implement iterative improvements | - Maintenance: Assign a Marketing Ops champion for continued support |

4. Potential Challenges and Mitigation Strategies

- Regulatory and Compliance Hurdles**
 - Mitigation:** Collaborate with Legal and Compliance teams to ensure that data handling satisfies GDPR, MiFID II, and other relevant financial regulations.
- Complex Integrations with AI or Big Data Feeds**
 - Mitigation:** Engage Data Science and DevOps to build robust data pipelines, supported by exhaustive documentation.
- Scalability and Performance**

- **Mitigation:** If data volumes increase sharply (due to multiple large feeds), validate that both the CRM and data warehouse can scale appropriately.
 - 4. **Cross-Functional Alignment**
 - **Mitigation:** Conduct regular meetings between Marketing, Sales, Finance, and Data Science to establish task priorities and manage stakeholder expectations.
 - 5. **User Adoption**
 - **Mitigation:** Offer detailed training programmes, concise procedural documentation, and maintain open feedback loops for ongoing improvements.
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5. Time Savings and Data Accuracy Improvements

- **Reduced Manual Intervention:** By automating lead scoring, onboarding, and reporting, repetitive tasks are minimised, allowing teams to focus on more strategic initiatives.
 - **Enhanced Data Reliability:** Standardised and deduplicated CRM data fosters improved personalisation, precise segmentation, and compliance—factors that directly influence conversion rates and client satisfaction.
 - **Accelerated, Data-Driven Decisions:** Frequent automated reports ensure that stakeholders, including senior management, have near real-time visibility into key metrics such as pipeline health and marketing ROI.
 - **More Efficient Collaboration:** Seamless handoffs between Marketing, Sales, Finance, and Data Science reduce errors and expedite project timelines.
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Conclusion

Assuming the role of **Marketing Operations Analyst** at RavenPack provides a singular opportunity to shape the future of AI-led financial analytics. By:

1. **Cleansing and optimising CRM data,**
2. **Implementing a robust lead scoring model,**
3. **Automating the client onboarding experience, and**
4. **Streamlining the weekly reporting process,**

you will substantially boost the effectiveness and precision of RavenPack’s marketing operations. Such enhancements will **streamline internal workflows, improve client experiences, and empower stakeholders** with reliable data—key components of RavenPack’s ongoing innovation in FinTech and AI.

With thorough planning, cross-departmental collaboration, and continuous refinement, you will enable **data-driven decision-making** that elevates RavenPack’s product suite, furthering its leadership position in the dynamic world of finance and artificial intelligence.