



RavenPack

Case Study

Marketing Operations Analyst
Hiring Exercise

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Agenda

- CRM Data
- Lead Scoring System
- Customer Onboarding Workflow
- Weekly Reporting Process Plan
- Potential Challenges
- Benefits to Marketing Team

CRM Data

Key Points:

- Communicate to relevant stakeholders, customers, and employees throughout process
- Stay consistent with formatting and methods
- This is an ongoing process, but take steps to make it easier in the future

Steps to Clean and Optimize CRM Data:

- **Assess:**

- Ensure there are no missing records
- Make sure the data is accurate with no typos or errors
- Determine most important data points

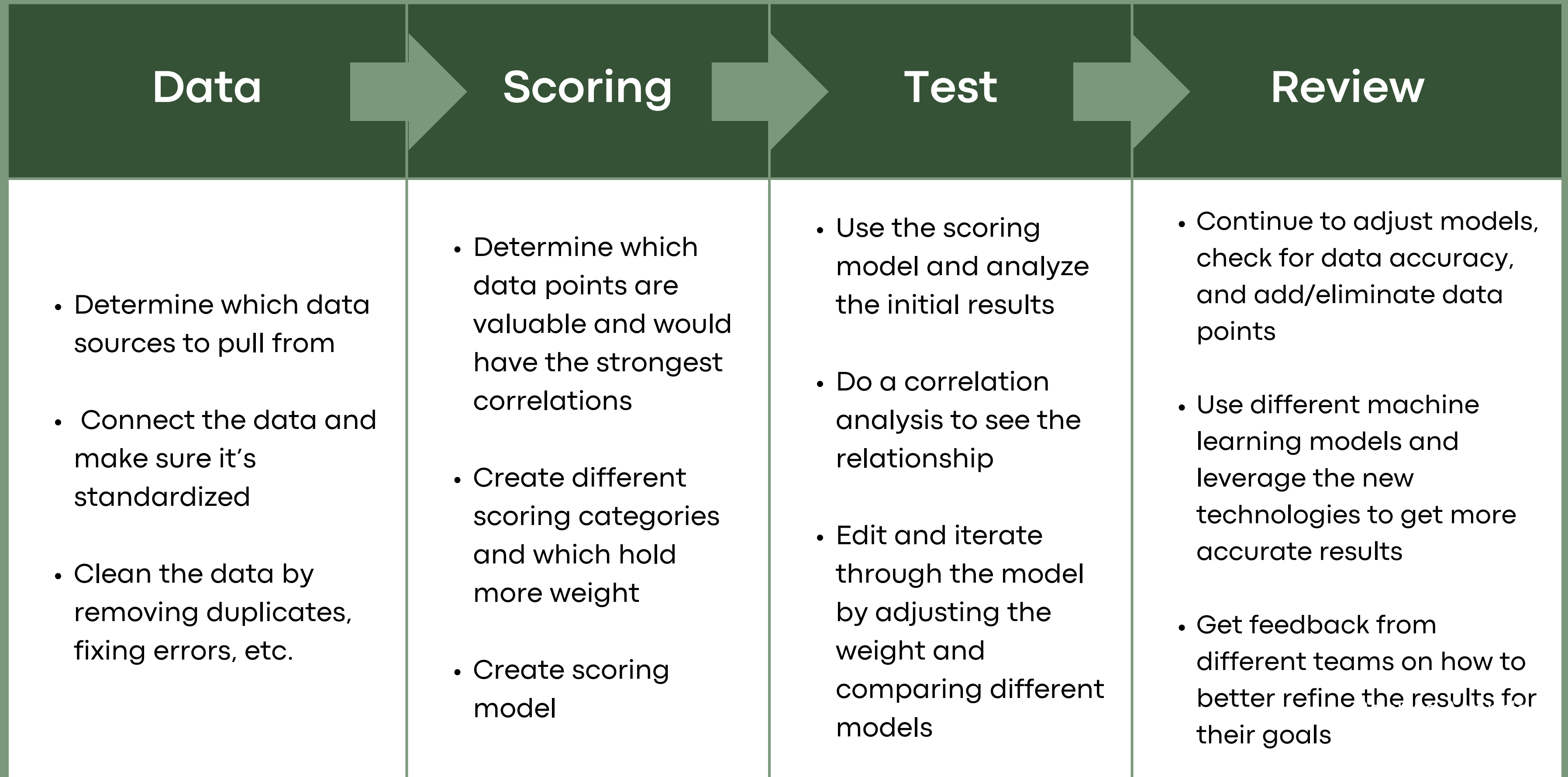
- **Edit:**

- Get rid of duplicate values (where all criteria matches)
- Correct typos or errors
- Add any missing data / update old data

- **Prevent:**

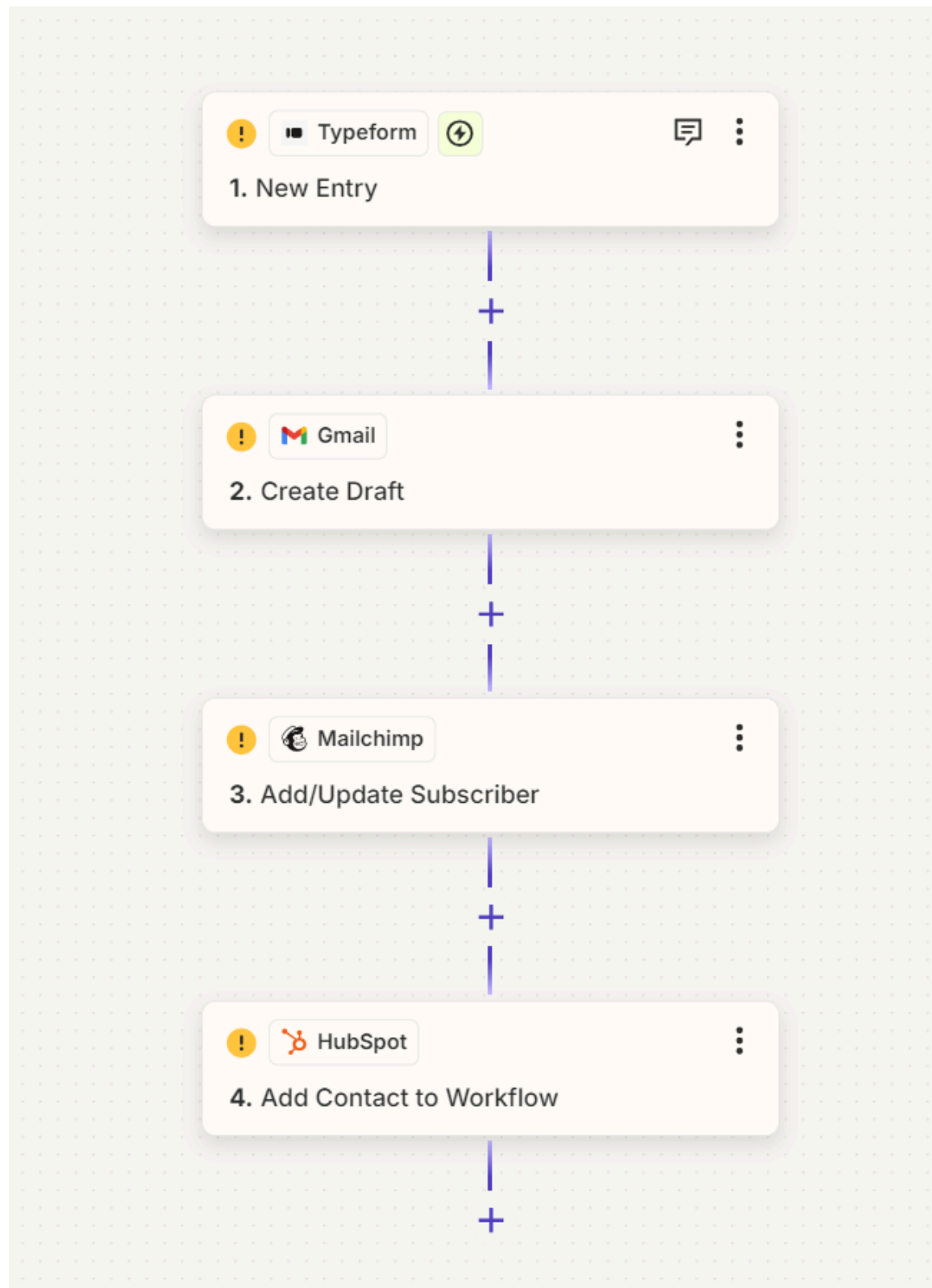
- Create data validation rules to prevent future errors
- Ensure security is strong to protect privacy
- Save time for analysis by segmenting and grouping customers by shared characteristics

Lead Scoring System



Customer Onboarding Workflow

When a new customer is added to the system, they will receive an email welcoming them to the company. They will then be added to the email marketing database. Their information will also be added to the workflow or sent to the person most relevant to follow up with them regarding their needs.



Basic draft using Zapier

Weekly Reporting Processing Plan

Steps:

- **Step 1: Data**
 - Figure out which data sources to use and clean the data
 - Make sure data is secure
- **Step 2: Visualize**
 - Create report templates with visualizations on Tableau or Power BI
 - Connect the data sources
- **Step 3: Automate**
 - Ensure the data is refreshed correctly and take steps to prevent errors
- **Step 4: Deliver**
 - Send out the automated reports and get feedback how to optimize and improve the process

Potential Challenges

01

Data Quality

By automating the process, there is a chance the data could have errors, missing values, or have inconsistencies with formatting. It also could impact the processing time if there are large datasets.

02

Automation Drawbacks

There may be issues in getting the visualizations to look unique to the dataset if they are automated. There could also be errors that appear that are harder to catch because of how many tasks are automated.

03

User Errors

With any new technology it may be difficult for employees to adapt to these new processes. They eventually can save time and money, but at first can be more costly because of fixing the errors. This could also cost people jobs so they may be hesitant to change.

Benefits to Marketing Team

Gives the marketing team more accurate information to make data-driven insights based on the customer trends.

Over time will reduce human error and make sure all processes are handled the same way.

Fosters more collaboration within the team because everyone has access towards the same data and insights.

Eventually will save a lot of time and money to automate tasks that normally would take a long time. This gives more resources to marketing efforts.

Can forecast and predict behavior better due to higher volume of data.

Data will be updated immediately so the team will have results faster and stay ahead of competitors.

Thank you for your time.

[Back to Agenda](#)

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