Suncorp Case Study

How innovative technology helps leading financial services group improve marketing compliance processes.

Overview

The Suncorp Group is a leading financial services group in Australia and New Zealand offering banking, wealth management and insurance products and services through its well-recognised brands including Suncorp, AAMI, GIO, Apia, Shannons and Vero, as well as those from its partners.

With a range of brands, an explosion of multi-channel campaigns and operating in an increasingly compliance-driven environment, Suncorp used the IntelligenceBank Marketing Operations platform to power the Suncorp Marketing System (SMS) which automates campaign approvals with the aim to uplift good governance and embed a more robust process for tracking approvals, and adherence to regulatory requirements. This new way of working has driven a cultural shift towards empowering marketing teams to self-assess creative content and greater clarity around roles and responsibilities in the end to end marketing process.

According to Marketing Operations Excellence Manager, Danni Robinson:

"SMS provided solutions to many of our business challenges, including providing simple and compliant file sharing, a digitised estimate and creative approval process and feedback captured for audit purposes."

Danni Robinson - Suncorp, Marketing Operations Excellence Manager

Overview

With IntelligenceBank, not only has Suncorp made the creative briefing process easier and more efficient, it has at the same time used IntelligenceBank's advanced marketing features to configure a tool developed together with the Suncorp Legal Advisory team for compliance review of marketing creative into the platform, for a more seamless user experience.

Key features used within the platform to achieve this outcome include:

Integrated marketing campaign briefs for approvals and collaboration with over 15 agency partners

A 'self-help' tool on a campaign brief level that enables:

- Review of marketing creative for adherence to compliance requirements including capture of decision-making logic;

- A disclaimer 'engine' that facilitates disclaimer application by brand and product; and

- Stakeholder review and Leader and Legal escalation process flow.

A marketing risk assessment score in the creative development process

"We are very excited about our new content review and legal advisory tool as it allows our marketers to meet legal requirements from the early stages of a campaign brief and automatically loops in legal when required.

Our processes are now more efficient, and we have peace of mind knowing all creative runs through the appropriate channels before it hits the market.

This is no small achievement given the size of our business, especially when combined with our strict compliance requirements."

Danni Robinson - Suncorp, Marketing Operations Excellence Manager

Read on to find out how Suncorp manages the marketing approval process, while staying on brand and compliant within a complex regulatory environment.

Integrated Campaign Briefs

All great creative campaigns start with a brief. By standardising this process, and ensuring early stakeholder engagement, Suncorp ensures better creative outcomes and reduces the typical 'back and forth' as the creative process starts when briefs are signed off.

Not only does this generate better outcomes in terms of creative output, but according to Go To Market Manager, Lucianne Davey:

> "The campaign brief in SMS gets our team thinking about our customers first, what's in their best interest and drives clearer messaging across campaigns. Future improvements over the coming months will ensure the brief is as customer-centric as possible and meets the needs of Suncorp and our agencies."
>
> *Lucianne Dave - Suncorp, Go To Market Manager*

Suncorp have rolled the IntelligenceBank platform out to agencies, partners and suppliers to ensure a closed loop of communication, versions and approvals which adds rigour to the process.

Managing the Legal Requirements – How, When and Why

When you are managing multiple brands and products across different states, ensuring a robust content review process and keeping up with the different disclaimers legally required to be featured on communications is difficult to maintain, manage and communicate with the broader team.

The Suncorp Legal Advisory team knew there was a better way and turned to IntelligenceBank to enhance their legal self-assessment tool for Brand & Marketing. Based on IntelligenceBank's custom forms with conditional logic, the team created an automated content review tool, which empowers individuals to review their content and assess their disclaimer needs early in creative production (SEAL).

According to the Head of Legal Advisory, Eloise Lyons:

> "The introduction of SEAL in SMS has improved efficiency, accountability and risk management. It has enabled the way in which our Legal team and Brand & Marketing work together to be transformed for the better."
>
> *Eloise Lyons - Suncorp, Head of Legal Advisory*

Managing the Legal Requirements – How, When and Why

This innovative process uses more than 1,000 variables and prompts the marketer or agency partner to define the type of communications they are doing (by brand and product) and then the system automates the relevant content review questions and disclaimers that must be used. This is especially critical if price points or yield claims are used. The tool also provides guidance and explanations, as it walks users through a series of conditional questions which adjusts based on the answers provided. Finally, through the use of over 100 decision points, the system will select the correct disclaimer out of over 1,000 possible disclaimer combination options.

Visual representation only.

For example, a master brand radio ad in one state, will require different considerations than a car insurance print ad that advertises savings in another state. The tool ensures users get relevant guidance and select the right disclaimer, while also explaining the reasons behind the decisions.

With the right content review considerations and disclaimer solutions available at everyone's fingertips, the creative process can run more smoothly, and most importantly, great creative work gets done more efficiently and adheres to regulatory requirements.

Suncorp's Key Take Aways

With Suncorp's commitment to marketing compliance, in a short period of time, Suncorp has moved from multiple systems and emails to a unified and automated process.

Here is how they did it:

Launched Components Over Time
Suncorp started with online creative briefs and approvals and moved into risk self-assessment and the legal advisory tool engine in different phases to allow for greater user adoption.

Explained the "Why"
For many on the marketing team, a new system was all about efficiency but for senior marketing management and the Legal Advisory team it was about decentralizing marketing compliance and making it 'everyone's job'. Adoption increased when people understood the importance of compliance, which has never been more important than in the current regulatory environment.

User Experience Matters
Suncorp made the UX great with friendly colors that mirrored their brands and ensured business requirement processes such as verifying claims in advertising were simple for anyone to use and follow.

Be Curious
Suncorp brand values are to "be curious", "find solutions" and have the courage to "be different". With their innovation and vision, they certainly achieved that by extending IntelligenceBank's out of the box software with their take on managing the marketing compliance process.

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30 Briefs / Month
All creative briefs are managed through the system for greater compliance and efficiencies

3 Hours/Brief
Saved by providing marketers with the correct disclaimers from the first stages of a campaign

200+ Marketing & Brand Users

Get to know IntelligenceBank

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We are the leading Marketing Operations Software, specializing in helping financial services marketers seamlessly manage brand governance, digital assets, creative content approvals and compliance, and creative project management. IntelligenceBank's beautifully designed platform is used by great brands globally.

If you would like to know more about how Marketing Operations Software can virtualize your marketing operations, our friendly experts are just an email or phone call away.

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