



CASE STUDY

Elements Financial Cashes in With Automated Direct Mail



INTRO

Elements Financial has leveraged direct mail automation and Salesforce Marketing Cloud integrations to overcome challenges, streamline operations, and amplify customer engagement. With PFL's help, the financial-services company propelled compliance communications and enhanced client relationships, as well as discovered the untapped potential of compliant, timely, and trackable direct mail campaigns.

40 Hrs.

Per Month Saved
on Manual Processes



200

Additional Leads
Exceeded Per Campaign



About

Elements Financial is a credit union headquartered in Indianapolis. It's the 4th largest credit union in the state of Indiana.

Industry

Financial

Platform

Salesforce Marketing Cloud

Audience

Customers

PROBLEM

On a Mission to Streamline and Scale Direct Mail

Elements Financial, a prominent player in the financial-services sector, wanted to effectively integrate its robust Salesforce platform with their direct mail operations. Their emails were seamlessly tracked through the platform, but the same couldn't be said for their direct mail campaigns. This discrepancy required extra time and resources for the marketing team to effectively maintain compliance, accurately measure success, and efficiently allocate resources.

SOLUTION

Integrations Leverage Automation for Time and Dollar Savings

Elements Financial turned to PFL to address their need for seamless integration and effective tracking. The partnership enabled them to print, deliver, and track an array of crucial communications, from compliance letters to credit notifications. "These new capabilities greatly improve the service we can provide on our inbound calls, because our reps can quickly see which direct mail pieces were sent to the caller—and easily answer their questions," said Element's Marketing Cloud administrator, Matt Brulet. By taking advantage of PFL's Salesforce Marketing Cloud integration, Elements Financial automated and streamlined its manual processes, which freed up valuable time and resources.

"Our Salesforce rep recommended PFL for their ability to provide time-sensitive daily print orders and personalized letter formatting. We'd recommend PFL and their solutions, as they continue to be a great partner for Elements Financial."

— Matt Brulet, Marketing Cloud Administrator

RESULT

Measurable Improvements Lead to Lasting Results

The impact of Elements Financial's partnership with PFL was transformative. They reduced manual efforts significantly, saving 40 hours each month that were previously spent on the management of credit score disclosure and adverse action letters. Plus, Marketing Cloud Administrator, Matt Brulet said, "Our Wealth Management Persona campaigns that blended email and direct mail messaging exceeded our annual goal of 200 additional leads for the firm."

Additionally, compliance-related mailers gained more timely and traceable delivery, ensuring regulatory adherence and the avoidance of fines and penalties. The pairing of email and direct mail continues to provide a more comprehensive approach to engagement for Elements Financial, where tangible mailers reinforce digital efforts.

KEY TAKEAWAYS

Direct Mail Solves Complex Challenges

Elements Financial's story highlights the evolving landscape for print marketing, where data-driven automation and personalized direct mail solve complex challenges. By embracing PFL's expertise, Elements Financial seamlessly integrated direct mail automation into their marketing arsenal. This strengthens client relationships, boosts efficiency, and keeps the company compliant. The company also currently has plans to implement direct mail into their revamped employee onboarding experience.

"In 2021, our Wealth Management Persona campaigns that blended email and direct mail messaging exceeded our annual goal of 200 additional leads for the firm."

– Ross Graham, Assistant Vice President, Creative & Digital Experience



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