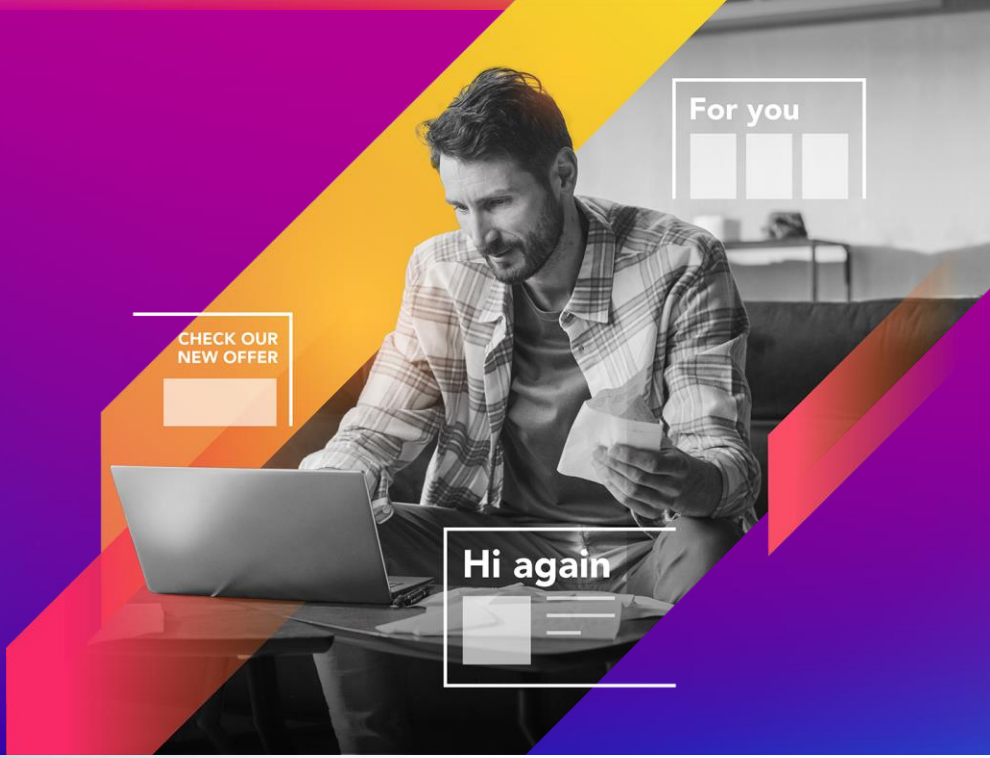




Efficient Operations Through Platform Modernization

How platform redesign, direct data integration, and compliance automation **improved operational efficiency, reduced risk, and accelerated time to market.**



Case Study: Modernizing Campaign Operations with Direct Data Integration

Using platform-native segmentation, real-time data access, and automated compliance workflows to reduce operational strain and enable scalable growth.

Customer

A leading national financial institution with a long-standing digital marketing partnership sought to modernize its campaign operations and reduce risk across email and compliance workflows.

Challenge

- Manual file-based workflows limited scalability and slowed execution.
- **Operational Risk**
Errors and failed deployments
 - **Slow Launches**
Weeks to activate campaigns
 - **Compliance Strain**
Manual, costly processes

Solution

- A streamlined, platform-native redesign improved control and speed.
- **Direct Snowflake Integration**
Eliminated file transfers
 - **Native Campaign Setup**
Reduced technical dependency
 - **Automated Compliance**
Email-first regulatory triggers

72%

Reduction in campaign errors tied to file processing

Faster time to market

Data integration and campaign setup reduced from weeks to minutes

27,000+

Automated compliance emails sent last year, reducing direct mail costs

Key Takeaways for Financial Marketers

- ✓

Direct data integration **reduces operational risk** and eliminates fragile file-based workflows
- ✓

Platform-native segmentation **empowers marketers and decreases technical lift**
- ✓

Real-time data access **accelerates campaign execution and enables triggered engagement**
- ✓

Automated compliance workflows **lower costs and reduce manual processes**
- ✓

Modernized infrastructure **creates scalability** and supports long-term partnership growth
- ✓

Streamlined operations accelerate execution while **improving oversight and compliance control**

Why Zeta

- Intelligence

AI-powered personalization at scale
- Trusted

Proven results across enterprise brands
- Ongoing Support

Full-service partnership and ongoing optimization
- Scalable

Flexible, modular platform built for the future