EVALANCHE CONVINCES TIME AND AGAIN ALONG PAYONE'S MERGER HISTORY

As a merger-proved company, PAYONE GmbH was faced with the challenge of unifying all the structures of its sub-companies as well as providing the marketing team with an intuitive, easy to use tool. Together with the Evalanche Gold Partner entergon, the financial service provider has unified its Customer Relationship Management (CRM) and, thanks to the right connector, combined the CRM system with the Evalanche email marketing solution.

PAYONE GmbH is a joint venture of the French payment and transaction service provider Worldwide and the DSV Group that offers cashless payment options. Headquartered in Frankfurt am Main, the payment service provider currently employs 1,600 people. PAYONE's company history is marked by numerous mergers: in 2017, the company merged with B+S Card Service, and in 2018 with Ingenico Group. Further, in 2020 they joined Worldwide as its parent company. The fintech company's merger history entailed its email marketing to be characterised by a wide variety of tools, a proliferation of forms and little structure. „As a result of the mergers, we were constantly faced with the task of questioning our tools and structures, standardising them again and thus creating the greatest possible benefit for our changing company," explains Alexander Rosenthal, Associate Director Customer Journey Marketing at PAYONE. „So, at some point, the question inevitably came up: Which solution has the potential to become our solution of the future, and which service provider can offer the set-up we need?"

PROJECT FACTS

Industry:
Financial services

Company:
PAYONE GmbH

Company size:
1,600 employees

Project focus:
Standardisation of the system landscape in the area of marketing

Systems involved:
Evalanche, Salesforce

Highlights:
CRM Marketing Automation Integration

Objectives:
Sales relief, smooth data flows, 360-degree customer view

Challenge:
Merger-related missing structures, data mapping between Salesforce and Evalanche

Results:
More efficient email marketing, data synchronisation between CRM and marketing automation

THE INITIAL SITUATION

Upgrading the email marketing

In over ten years of merger history, PAYONE encountered a range of marketing tools and service providers. Following a recommendation by the B2B communications agency Möller Horcher, in 2016 B+S Card Service brought entergon on board, a cloud and full-service provider and partner of SC-Networks, manufacturer of the marketing automation solution Evalanche. What used to be a mandate to professionalise email templates and to bring different content variations in a clear and concise manner together, evolved into a much larger project for entergon in the course of the mergers: to accompany the rebranding of the newly created PAYONE - including the task of setting up the financial service provider in a future-proof way in terms of marketing and upgrading the email marketing automation.

THE REQUIREMENTS

Alexander Rosenthal, Associate Director Customer Journey Marketing at PAYONE (Source: PAYONE)

Side by side

A growth-driven company like PAYONE was in need of partners for professional brand communication who could keep up with the pace of development and were able to adapt to changing requirements. With SC-Networks, the company found a provider for email marketing automation that could meet all its require-ments and offered a solution that met its needs. Thanks to the diverse features of Evalanche and the great flexibility for different application scenarios, SC-Networks had everything it needed to support PAYONE GmbH in its communication from financial service provider to fintech group. With the rebranding, another point became immensely important for the Frankfurt-based company: data protection and security. Since the DSGVO-compliant processing of data is a central feature of Evalanche, the decision was easy. „In the end, the experts of SC-Networks have proven with every PAYONE rebranding that they are highly adaptable. They won every round anew - and convinced us time and again," Alexander Rosenthal knows.

„Getting stuff done"

SC-Networks were not only making a persuasive argument for Evalanche in terms of functionality, but also with professional competence and by ensuring a strong partner. Entergon, on the other hand, was convin-cing with its people business, having just under 30 employees, who ensure short communication paths and agreements that can be implemented quickly. This was something that PAYONE appreciated very much. For the payment service provider, immediate accessibility and the ability to react quickly in case of doubt were essential. On top of that, entergon and SC-Networks proved to be extremely solution-oriented and flexible; even special projects such as a compact mini-CRM with Evalanche as the database basis or the handling of PAYONE's fault communication via the email marketing tool could be implemented smoothly. With the appropriate marketing automation solution on the one hand and entergon as a full-service provider on the other SC-Networks provided ideal synergies for PAYONE to benefit from.

THE IMPLEMENTATION

Marc Heinisch, Technical Lead Marketing Automation atventergon (Source: entergon GmbH & Co. KG)

Customisable templates and effective support

Even before the last merger of PAYONE, the focus was on revising the email and newsletter templates. entergon developed uniform templates, specially adapted to the needs of customers. New email templates with various configuration options as well as new article types were integrated and merged in a transparent and intuitive way, so that PAYONE employees can now build and send all mailing variations themselves. „In our adaptations, we always make sure that the templates are as convenient as possible for the users to handle," explains Marc Heinisch, Technical Lead Marketing Automation at entergon. „The marketing department has nothing to gain from having templates with a hundred different features if no one understands them. We see ourselves as a technical service provider that wants to empower the customer to implement projects themselves."

Due to the outsourcing of malfunction communication in Evalanche, malfunction mailings can be sent without any problems. (Source: PAYONE)

Thinking outside the box: fault communication with Evalanche

One of the special projects showed that not only marketing could benefit from the professional email marketing solution: PAYONE even partially outsourced its fault communication to Evalanche in order enable sending fault and maintenance mailings to its own customers without any problems. Here the tool's ease of use is an immense advantage as well: the company's service staff do not have to be specially trained in Evalanche but can implement mailings themselves quickly and easily. A password-protected area enables all authorised employees to set up standard mailings within a very short time and send them to the respective target group.

Next Level: CRM system connection

At the end of 2021, an internal analysis on the part of PAYONE revealed two central problems that needed to be solved: On the one hand, it was planned to completely automate manual processes and thus facilitate the team. For this purpose, the Evalanche software, which had already been adapted to PAYONE's needs, had to be connected to the CRM system Salesforce. In the first step, entergon developed software that gave employees access to data in Evalanche from outside the company and allowed them to enrich it with information, for example from sales meetings. Using a dashboard, employees were able to complete customer contact data and make it available for email marketing. Secondly, PAYONE wanted to simplify the complex structure due to the history of the merger of a multitude of systems. This involved training to create an understanding of what unification, automation and the integration of CRM and marketing automation can achieve in areas such as new customer acquisition. This also involved optimising mailings as part of the internal „One Journey" project. It related to the entire customer journey communication along all touchpoints, which now had to be mapped within the Evalanche tool as well as in the customer portal or in the customer contact service.

Successful onboarding mailings using the Salesforce connector. (Source: PAYONE)

Connector for Salesforce

In mid-2022, the Salesforce connector came into plaz. The question was: What is the best way to connect the CRM system to the email marketing automation? On one side stood Evalanche as a database with contact data such as the email address, enriched with customer and debtor numbers. On the other side stood the CRM system Salesforce, which contained basic customer data such as company size, contract start date and turnover. The problem for the linkage: Salesforce did not use the email address as leading information to identify a person, but the customer's name. As a result, the email marketing tool and CRM system were not able to correctly match contacts. entergon's connector solved this by making data in the CRM system groupable and selectable by customer groups, which could then be transferred to Evalanche. The connector is in regular exchange with Salesforce, fetches the selected data and translates it for use in Evalanche. At the end of 2022, this resulted in the first onboarding mailing as a welcome to all new customers. „The first mailing is always a milestone," explains Alexander Rosenthal. „If everything works out, you can tackle further steps. The solution from SC-Networks is a very strong core system for email marketing and email automation. entergon is the right partner for us because they expand this core system according to the customer's needs and create a link to our content and technological CRM world."

CRM- Marketing Automation Integration

The link between the CRM system and the marketing automation solution makes it possible to automatically provide prospects and existing customers with relevant content - at the appropriate time and at the right touchpoint. Linking the two systems also ensures that information from both sources is available in a consolidated form, giving B2B companies a 360-degree view of each individual customer. Integrated with each other, customer-related data from the CRM system - such as information about products already ordered, sales contact notes or information from possible old contracts - flow into the respective customers or prospects profile of the marketing automation platform. Such sharpened profiles create the basis for precisely fitting marketing campaigns and increase the chances of all measures to be successful. Evalanche offers several prepared interfaces and connectors to various CRM systems: In addition to Salesforce, these include CAS genesisWorld, SAP CRM, MS Dynamics CRM, Sugar & SUITE CRM, Cursor CRM, cobra CRM and many more.
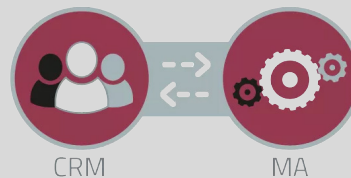
Goal for the future: „Hands on!"

For the future, PAYONE is planning a return flow of hard bounces, e.g. of non-existent mail addresses, from Evalanche into the CRM system in order to create a cycle as well as to ensure the quality of the data in both systems. In addition, the channel is to be set up more broadly so that more triggers (for mailings) such as certain events can also be used in Evalanche. PAYONE wants to continue to develop in depth: The next goals are a follow-up and churn prevention at the end of the customers lifetime. Overall, the error-free and smooth data flow should enable a 360-degree view of the fintech company's customers.