

Case study: co-brand cards management pack

Brief

- The client had recently won a key **co-brand partnership** outside of its' home market.
- It was using an **3rd-party processor** for the card platform and was reliant on basic management information.
- Optima were engaged to create a **management reporting pack** including the creation of transactional and segmentation reporting to support the lifecycle management of the cards.

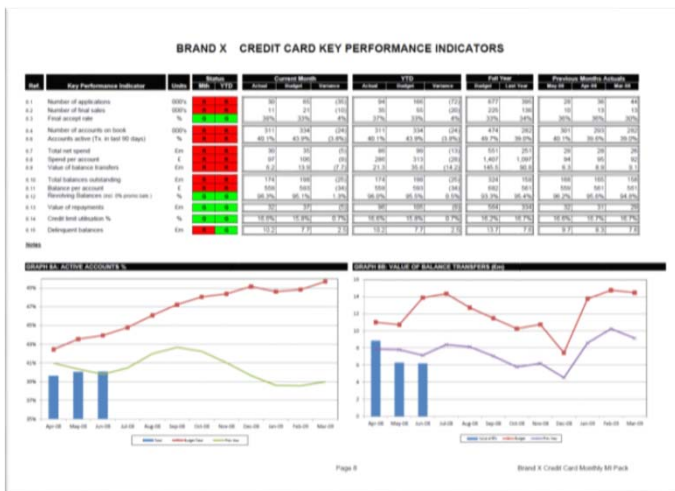


Approach

- We undertook a number of **stakeholder workshops** to establish the **critical measures of success** for the new venture.
- From this, we created a **KPI framework** which underpinned each aspect of the **management reporting suite**.
- We worked with the technical teams to define **segmentation rules** which could be used for lifecycle management and reporting.



Results



Impact

- Effective **customer segmentation** enabled the business to quickly assess the **impact of proposition changes**.

