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# A Case of Smarter, Faster, Better Marketing

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**HOW WESBANCO'S MARKETING TEAM  
SOLVED THE MARKETING OPERATIONS  
AND EXECUTION CHALLENGES THAT  
ACCOMPANY A RAPIDLY GROWING  
DISTRIBUTED ORGANIZATION**

vya

# Introduction

## FAMILIAR PAIN POINTS OF TODAY'S BANK MARKETERS

During the break at an ABA training program for bank marketers, Amy Lowers listened as her peers lamented that they would not be able to return to their offices and implement the best practices they'd been learning about during their two weeks of sessions on content marketing, branding and digital marketing. The problem: they were bogged down in marketing operations and execution activities. When they returned to work, there would be events to support, brochures to be ordered and promotional items to buy, leaving them no time to implement the proactive marketing activities they'd been learning about.

Amy understood their frustration. It was not long ago she was in their shoes. Amy is Vice President and Regional Marketing Officer for WesBanco Bank, a community-oriented bank serving the states of West Virginia, Ohio, Pennsylvania, Indiana and Kentucky. In 2014, her marketing group was straining to keep pace with WesBanco's exponential growth. The bank would ultimately expand from just over 120 banking centers in 2014 to more than 170 today.

WesBanco recognized the time had come for a marketing resource management (MRM) solution to automate key processes that could help its marketing staff work more efficiently and focus on more strategic activities for the growing, distributed organization. It also understood the need to find the right technology partner to help meet its objectives. For WesBanco, that partner was Vya.

# The Situation

## **DETERMINED TO BECOME MORE EFFICIENT**

In 2014, with an increasing number of branches to support, WesBanco's corporate marketing department often found itself operating in reaction mode, which made it challenging to develop and implement strategic marketing programs. To become more strategic, WesBanco's marketing organization recognized that it had to:

- 1 Streamline its marketing asset management, to improve brand consistency, reduce compliance exposure and overcome employee recruitment and retention issues that had previously impeded growth.**
- 2 Integrate more efficient order fulfillment and tracking processes so staff would no longer be bogged down with tedious tasks, allowing them to focus on more strategic activities.**
- 3 Improve its budget and results tracking to make better informed spending decisions.**

## **A STRAINED MARKETING ASSET MANAGEMENT SETUP**

In 2014, WesBanco's most pressing need was for a system to help manage its growing assortment of marketing assets—a better way to help users throughout the organization know what marketing assets were available.

WesBanco had been using an intranet system that was difficult to navigate, causing employees to spend lots of time searching for items they needed. Even though an item might be available, employees would often be unable to find it and would end up purchasing something elsewhere. This led to added costs and inconsistent branding. For example, an employee might choose to buy pink shirts because they preferred pink to WesBanco's green.

When it came to enforcing corporate branding at the local level, marketing relied on employees to report where branded materials and ads were being used. This was time consuming and not always accurate.

## **THE RELENTLESS PACE OF ORDER-TAKING & SHIPPING FOR A GROWING ORGANIZATION**

As WesBanco continued to expand, the number of orders the marketing team received from the field also grew. In addition, the marketing team spent more and more time customizing materials. Their days became consumed with basic tasks, which prevented them from proactively assisting their branches with the kinds of strategic marketing support needed in order to grow.

Amy recalls, “We had all kinds of marketing items stored in our offices. I was shipping materials every day from my office just to keep up with all the bank centers we had at the time. If someone didn’t receive their package, we’d have to go track it down. And with no centralized system at the time, that was a time-consuming process.”

## **TRACKING BUDGETS & RESULTS**

WesBanco’s marketing budgets were tracked manually with spreadsheets, a process which did not scale well as the bank expanded. It was challenging to track spending by branch, and sometimes marketing would learn about purchases only after the arrival of an invoice.

WesBanco needed a system that could efficiently and accurately track budgets and give marketing a clear view into what was being spent and how it was being spent at the local branch level.

In addition, WesBanco needed a better way to monitor and record the success or failure of its marketing activities in order to make ROI-based spending decisions going forward.

# The Need

## **MARKETING RESOURCE MANAGEMENT, PRODUCTION AND DISTRIBUTION, BUDGET MANAGEMENT, QUALITY CONTROL AND RESULTS TRACKING**

WesBanco had been looking for a marketing resource management solution for some time. It had tried internal approaches, like putting a catalog on its own servers. But there were IT issues that made it clear an external system was necessary for implementing a shopping cart and solving its budget management challenges.

Amy reached out to 13 different companies in search of a solution. Some vendors told her WesBanco's needs were too small for them to support, and others said they were too big. WesBanco narrowed the field to three vendors and ultimately chose Vya.

"Vya provided the most complete solution to meet our needs," said Amy. "In addition, Vya had financial industry experience, which was huge—to find a partner with the combination of tech expertise and financial experience was very important. And, they were reasonably priced."

WesBanco also liked that Vya's MRM system was pre-built and pre-tested. According to Amy, "We could have gone out and asked someone to build a system. In fact, one vendor had some of what we needed and offered to build the rest. But we felt we really needed a partner that already understood the nuances of the banking industry."

# The Solution

## A PROVEN MRM SYSTEM MANAGED BY AN EXPERIENCED PARTNER

Vya worked with WesBanco to implement an easy-to-use MRM solution that addresses all of its challenges and provides opportunities for additional functionality as needed. The solution is anchored by a web-based MRM system, delivering:

- **WesBanco catalog** – This is a one-stop shop for all things WesBanco, with an easy, Amazon-like shopping experience. The catalog has made it easy for employees to order marketing materials.
- **Printing and distribution** – Once materials are ordered, Vya prints and ships them directly to where they are needed. The bank is enjoying tremendous cost savings from print-on-demand items, which have reduced warehousing requirements and waste from unused materials. Vya also replenishes WesBanco's promo inventory and helps with sourcing promo products outside the system to address specific needs for local events.
- **Digital asset management** – WesBanco now has better brand continuity and image control, with proper regulatory disclosures appearing on marketing materials.
- **Onboarding kits for new personnel** – Mortgage loan officers and treasury management professionals have immediate access to personalized items with their name and contact information, enabling them to be ready to sell within days of coming on board.

- **Auditing solution for compliance department** – Marketing can efficiently support the compliance department’s needs, with the ability to pull specific information, like a year-end view of ads that have run on commercial lending in a specific market.
- **Requests management** – Requests for things like checks for donations and sponsorship are now handled through the system, which also provides tracking.
- **Streamlined accounts payable** – Marketing now receives one monthly invoice through Vya, which greatly simplifies things for accounts payable.
- **Reporting and measurement** – With the MRM system, marketing is able to see exactly what is being purchased and which items are more popular. This results in better inventory management and also provides some insight into which items are most effective.
- **Advertisements** – One of the more recent components added to the system is a variety of approved ad templates that can easily be customized for use in local branches.



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- **Historical record** – The system provides an archive of materials and activities, enabling users to quickly look up what they’ve done in the past in order to inform future marketing decisions.

“The piece that is most beneficial is the budget control component,” explains Amy. “We know when someone goes into the system and makes a purchase. It ties into their branch budget. They know where they stand in terms of annual budget, which gives them a way to self-manage. They can pull all the materials they need. They know exactly where their orders are. And they can track all their shipping.”

## **SYSTEM MANAGEMENT & USER SUPPORT, GROUNDED BY HIGH-TOUCH SERVICE**

Vya manages the entire system on WesBanco’s behalf, further freeing up Amy and her marketing team to focus on strategic activities. This system management includes:

- loading WesBanco’s marketing assets into the system and templating them for easy customization at the local level
- uploading budgets and setting expirations on them
- providing system support by fielding questions from WesBanco’s users

Vya established a single sign-on to the system, so that when a new user signs up in the WesBanco system, their profile is automatically built into the Vya system. Then, they simply sign into the WesBanco system to access the MRM.

To ensure everything is working effectively and continues to address WesBanco’s needs, Vya and Amy have weekly business planning meetings.

“Working with Vya is fabulous,” affirms Amy. “I love the attention to detail that the entire staff had from the very beginning of the relationship. They make me feel as though I’m the only customer they have – even though I know I am far from it. I’ve worked with companies that provide excellent customer service during the ‘wooing’ period, only to be let down later when help is needed. I’ve never experienced that with Vya – the customer service is terrific.”

# The Results

## SMARTER, BETTER, FASTER

Since hiring Vya, WesBanco's marketing department has become a much more proactive team, able to effectively support the needs of its growing and geographically dispersed network of banking centers.

"The Vya solution has enabled our marketing team to support the tremendous growth of WesBanco while at the same time improving marketing operations efficiencies," explains Amy.

## 75% REDUCTION IN ADMINISTRATIVE CHORES

The MRM solution has enabled a 75 percent reduction in administrative tasks, with users doing a lot of things on their own that marketing team members were doing for them previously. This has allowed WesBanco to reallocate marketing staff to proactive campaigns that help the organization grow for the future.

"Our marketing team is no longer consumed with administrative execution, which makes us feel like marketers doing the jobs we were hired to do," says Amy. "We're now able to help branches in ways we never have before. For example, if I see a branch is down on loans, I can now focus on what we can do to go into that market and help grow that branch. We've discovered a lot of new possibilities."

## DOING MORE WITHOUT ADDING HEADCOUNT

Before working with Vya, WesBanco had analyzed the resources it would require to support the acquisition of more banking centers, and determined it would have to bring on more marketing employees. Working with Vya has enabled the bank to cancel that hiring plan, all while doing more.

Among the administrative tasks that are now managed through the MRM system are monitoring and reporting on budgets, researching previous event activities, check ordering, creating ads and other promotional items. And there's been a decrease in costs associated with waste.

Since Vya manages the system administration and because of how the solution is implemented, Amy did not need to hire someone who was a technical expert on the Vya MRM system. This also means she did not have to assume the risk of what happens when a dedicated system expert leaves the organization.

“Because of the Vya model, we enjoy all the streamlining benefits of the marketing platform without the systems management headaches,” says Amy.

## BANK-WIDE IMPACT

In addition to solving its primary marketing pain points, working with Vya has had a positive impact in other areas of the organization that had not been anticipated, including:

- **Building Services:** Building signage has now been integrated into the system.

- **Compliance:** The MRM system has significantly reduced the burden on the compliance group, enabling members to take on extra opportunities.
- **Risk Management** appreciates the reduced risk from improved compliance management.



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- **Information Technology** has been able to reduce the amount of storage solutions required. As a cloud solution, the MRM stores all documentation in the cloud. Workflows and approvals no longer have to go through email, eating up storage.
- **Procurement:** The system enables print-on-demand, which reduces waste and requires less warehousing.
- **Accounts Payable:** The budget management capabilities of the system as well as vendor consolidation have resulted in a decrease in the number of invoices being sent through to accounts payable.

- **Human Resources:** Mortgage loan officers (MLOs) are eager to come on board because they understand the benefits of the MRM system. New employee orientation items are housed on the system. And there's an employee store offering quick and easy access to corporate branded items like t-shirts.
- **Community Reinvestment Act:** Donation requests are processed through the system, which also stores all the relevant paperwork.
- **Sales, Training and Acquisition** teams are all using or promoting the system as an advantage for the WesBanco community.

Amy admits that there was work involved in making the transition to an MRM system. But there's no question that it's been worth it. She explains, "The Vya team did an excellent job in getting us up and running. They made it simple for us. It's actually difficult to remember back to what it was like before Vya. Because we've solved so many challenges with Vya's marketing resource management solution, my day-to-day is like night and day."



**BECAUSE OF THE VYA MODEL,  
WE ENJOY ALL THE STREAMLINING BENEFITS OF  
THE MARKETING PLATFORM WITHOUT  
THE SYSTEMS MANAGEMENT HEADACHES.**



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## LET'S DISCUSS.

I hope this WesBanco case study provided helpful insights. As you consider your own unique marketing challenges, please call me at 513-552-0143 or email me at [sales@vyasystems.com](mailto:sales@vyasystems.com) to discuss how Vya may be able to help.

You can also request a demo [here](#).



Allan Greer

## ABOUT VYA

Leading companies partner with Vya to streamline marketing operations. We simplify multi-channel marketing execution (digital, print, mail, promotional products) through our marketing resource management system and in-house production services. With Vya, you can enable field teams to easily order branded materials, facilitate co-branded marketing, and manage multiple marketing budgets, all while ensuring regulatory compliance.



Simplified Marketing Systems