



# Implementing ActionIQ at an Investment Management Firm



Ensured time-to-  
market adaptability



Created scalable and  
sustainable technology  
environment



Integrated CDP to  
the MarTech stack

## Client

Our client is one of North America's largest investment management firms. Their mission is to help their customers take control of their financial futures.



## Challenge

Munvo was approached by our client after they identified a gap in their MarTech and recognized they needed external expertise to understand how a CDP solution would solve the issue and bring their personalization and marketing campaigns to the next level. Internally, our client simply didn't have the bandwidth to pilot the innovation and ensure that the CDP became a critical part of marketing.

## Solution

We leveraged ActionIQ and a multi-phased approach placing Munvo as a core component of the project teams. This allows Munvo to engage with different stakeholders (data, delivery, etc.) structured and strategic manner. Our team presented proposed changes and then executed them, while providing ongoing support. By understanding the business impacts of changes, we were able to give recommendations that improved the processes and yielded business benefits.





# Results

As result of Munvo's helping our client roadmap and implement the CDP enabled continuous growth for the foreseeable future across all business lines through solid foundations & precise changes. This means that as the data needs change for the organization, they will be able to adapt and grow accordingly. In order to help the company succeed with its CDP & embrace it as an integral part of the MarTech stack, we focused on sharing best practices & lessons learned while contrasting the initial implementation. We also helped the team gain internal maturity when it comes to engaging with their CDP and improving their overall autonomy & skills. This enabled the dynamic realignment of their priorities as well when it comes to iterative development within the tools & platforms.

**“** *When we started working with the client, they relied on us to make all the changes and updates to their marketing platform. After a few months of enabling best-practices and helping the client through the changes, they were confident in their ability to run the platform efficiently and continue to change according to business needs.*



— **Serge Bohdjalian**  
VP of Professional Services  
at Munvo

## Benefits

**90%**

of CDP data sources  
were modelled &  
met the scalability  
requirements

**50%**

of CDP channel  
integrations were re-  
engineered to meet  
new cross-channel  
journey needs

**90%**

of data-points and  
segmentation were  
re-designed