

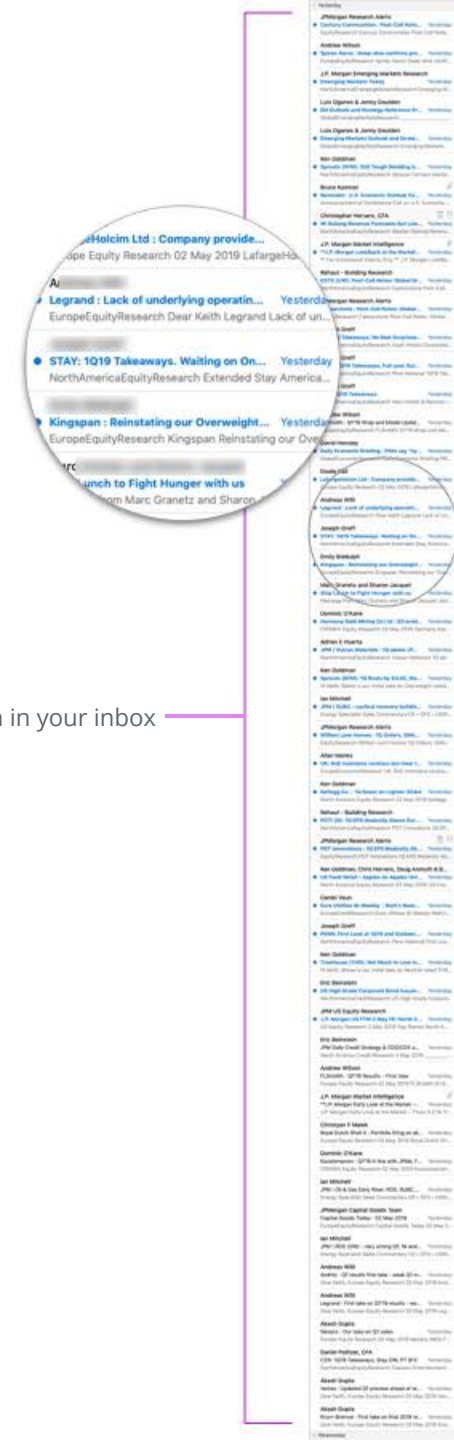
Case Study: My Research Subscriptions

Creating a better financial research experience for the customer

March 2019 – October 2020

Keith Mascheroni
User Experience and Information Design
www.keith-ux.com

One day's Research in your inbox



The Problem

- We produce world class financial research. Lots of it.
- Our sales force curates most of it for their clients.
- It's sent and consumed through email.
- It's often poorly targeted.
- They get frustrated. We look bad.
- Managing this is costly.

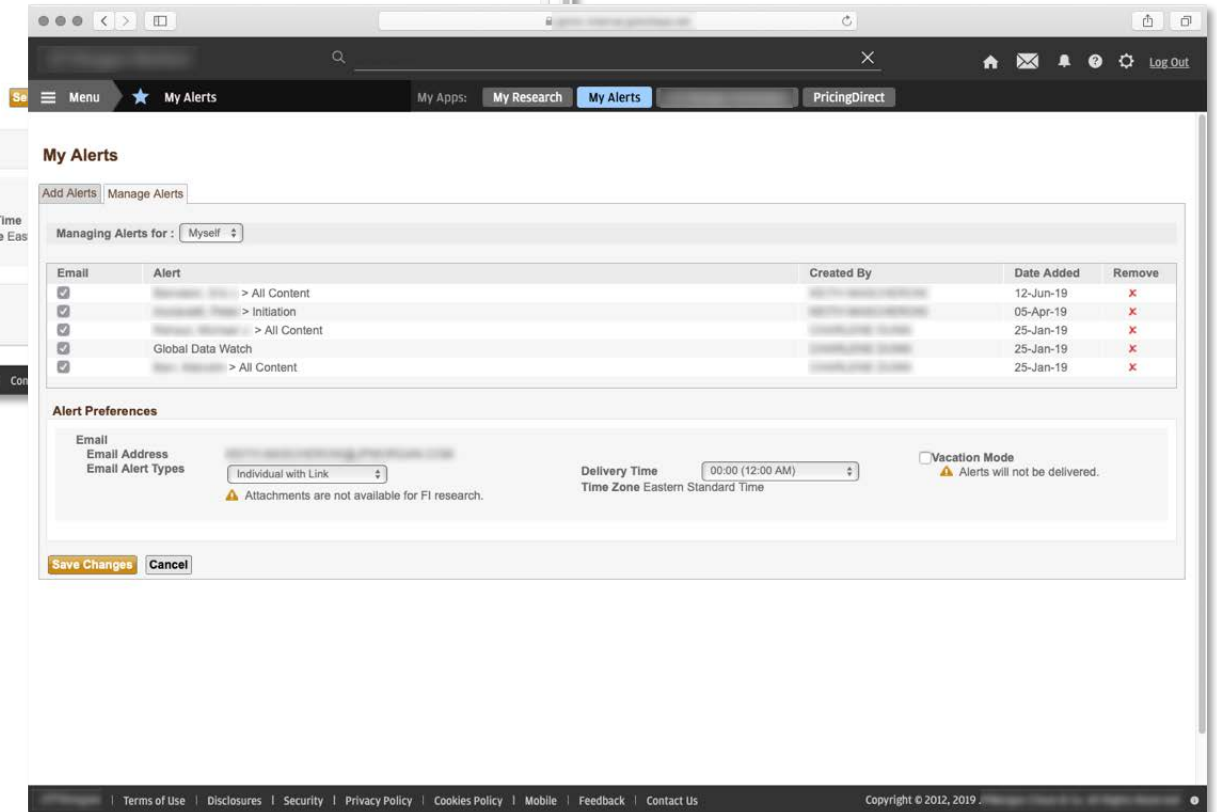
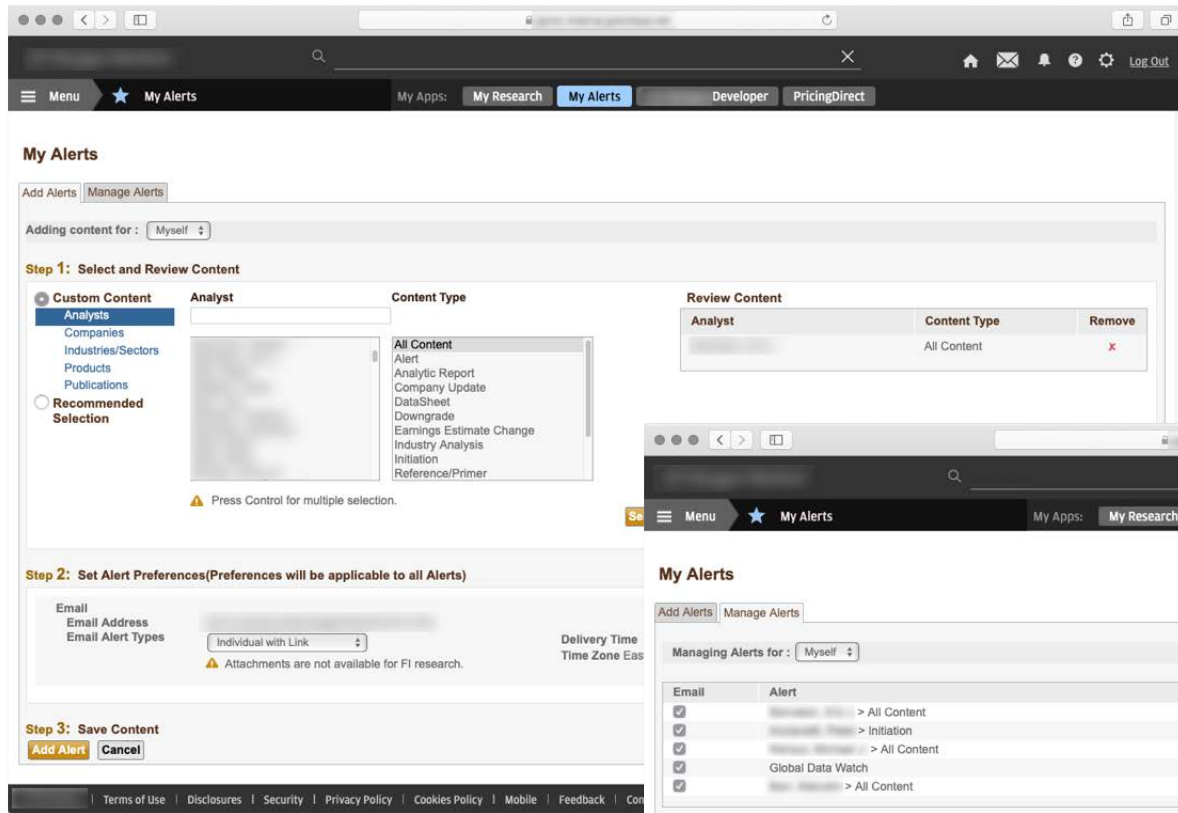
What we had to work with

- A subscription control panel
- Email distribution lists
- A content management system
- A CRM system

What we want

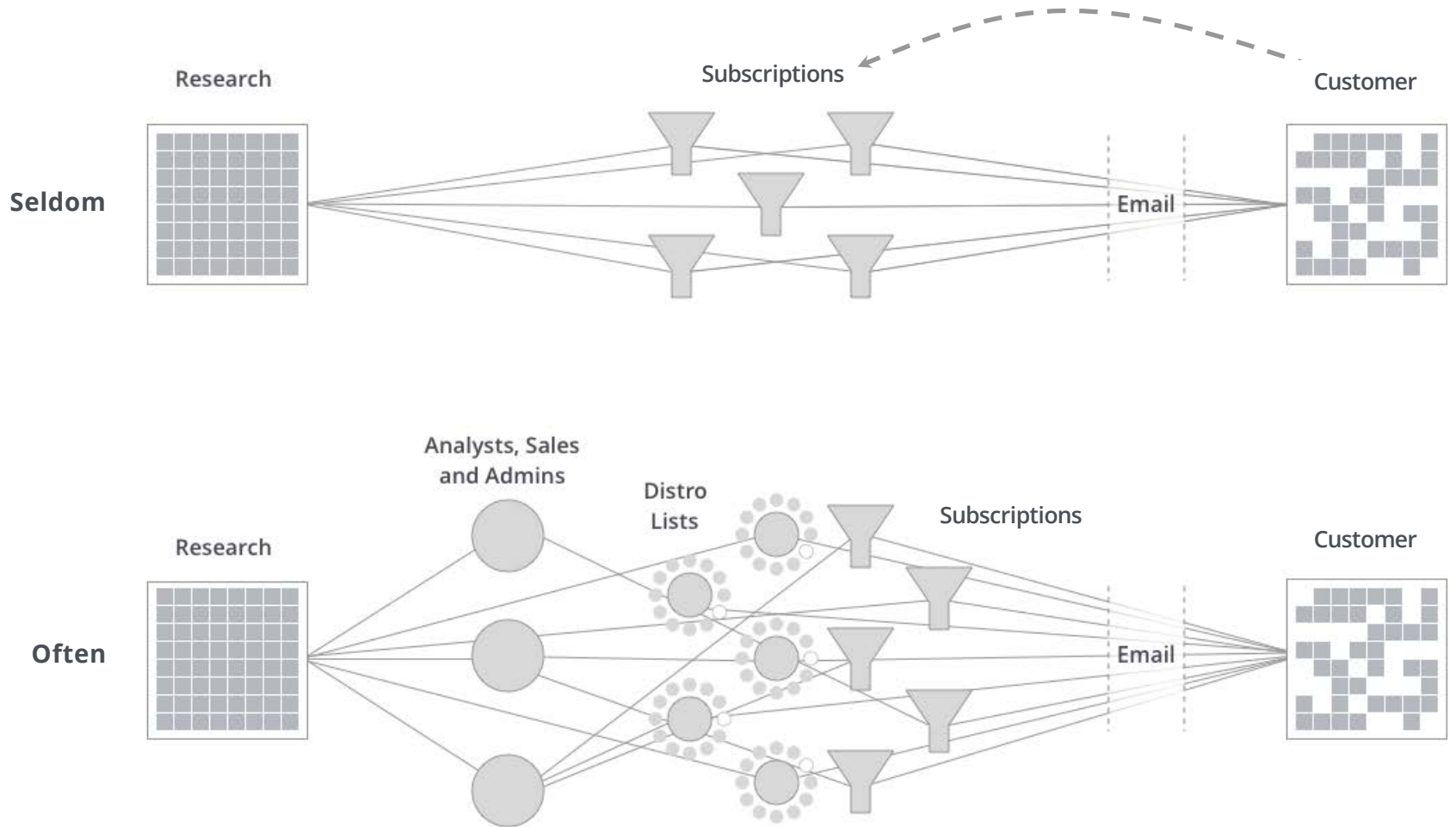
- More accurate targeting. Less content sent, more read.
- Understand what research matters.
- Know more about our audience(s).
- Discover ideas for cross channel sales opportunities.

The legacy system

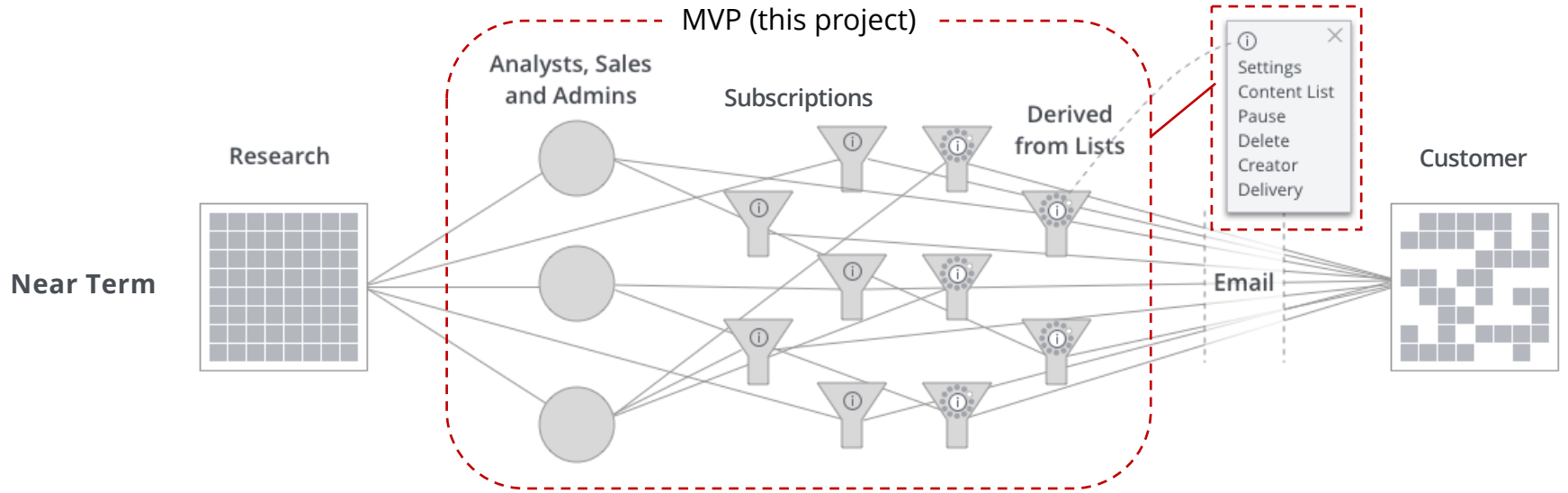


- **Subscriptions are not editable**, you can only delete them
- **No preview of content** you'll get
- **You can't tell how much content** you'll get
- You **can't search across categories** only within them.

The way things are



Where things are headed



Project Constraints

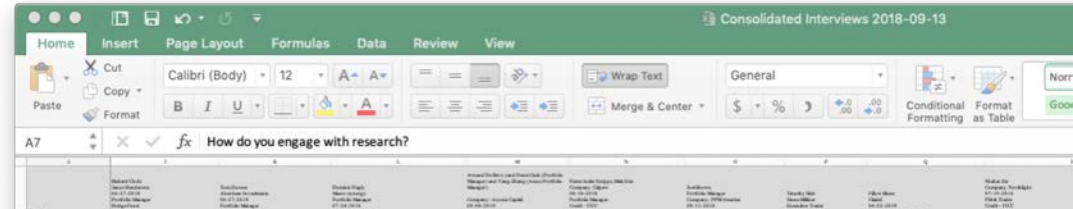
- **Lack of frictionless login** is a road block for Customers. They call Sales staff to manage their subscriptions, thus no ability to explore and discover research.
- **Poor information architecture** due to legacy content management systems mapped to unfamiliar research team and/or publication structures, rather than consumer friendly financial industry terminology.
- **Search criteria is limited** to RIXML database conventions. Lack of ability to search using abstract terms and natural language.
- **It's not clear what document types are available** for certain research, making it possible for user to create subscriptions that deliver no content.
- **Limited UX budget** due to substantial backend tech/dev requirements; Limited front end developer, research and visual design resources

Research, Discovery and Iteration

Research and analysis*

User interviews and persona definition helped define users' habits, pain points and requirements

- How would you describe yourself to a new colleague?
- When thinking about your role, what is important to you in your day to day?
- What are all the types of Research you know about?
- Describe your day yesterday, starting with "I got up in the morning"?
- How do you engage with research?
- What are your current research challenges?
- Who are all the people you interact with, and what part does research play in those interactions?
- What would an ideal research experience look like for you?
- What would you add to the following statement: "Research is ____ to me"?



Trader
My priority is not digesting research. Research is a conduit for information.

Portfolio Manager
Sustained out performance = Success

Analyst
Can I build an investment case from thematic content trusted analyst on a sector

Head of Research
"We want to know what we don't know, we are large consumers of information"

Attributes for Analyst:

- Beat a benchmark parameters
- Sourcing executive ideas or gaining
- Knowing what t
- Not to be inund
- Managing cash
- Being aware of holdings
- Accessibility to t

Attributes for Head of Research:

- Generate alpha through stock picks
- Understanding market vs holdings drivers
- Managing internal conversation on thematics
- Strategic Idea generation and risk mitigation
- Research resource allocation
- Analyst mentoring
- Understanding the "forest vs the trees"

Research Email Distribution Transformation

Business Requirements MVP

Project/Initiative
August 2019
Version 2.0

1 Email Distribution

1.1 Current state Recap

- Email is the largest distribution channel, with ~85% of current client readership via email.
- We currently support 3.5 million Research email subscriptions, via 4000 email distribution lists, managed by ~800 list owners.

Tasks

- Idea Generation, Hypothesis Validation
- Maintenance
- Trade
- Corporate Access
- Manage Staff**
- Build Predictive Models
- Manage Company Risk**
- Portfolio Cash Flow and Distributions

People I Interact with

- Sell Side Analysts
- Sell Side Sales
- Sell Side Trader
- Buy Side Trader
- Buy Side Analyst**
- Buy Side Head of Research
- Buy Side Portfolio Manager

* research was conducted prior to my engagement. It was the foundation of my work in redesigning the research distribution platform.

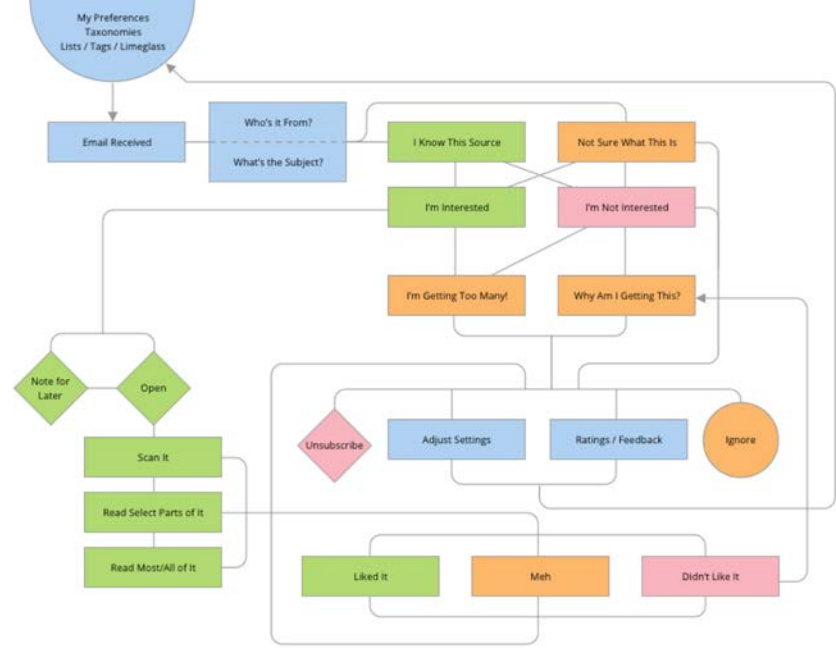
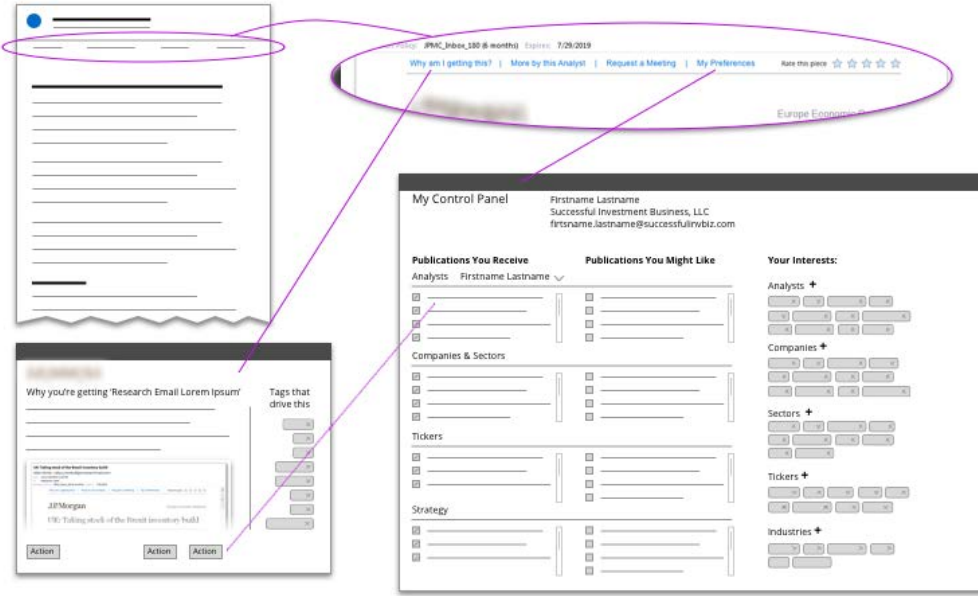
What we learned

- Clients don't understand why they are getting emails
- Clients complain they're on distribution lists they didn't ask to be on
- They don't feel they can stop unwanted emails
- Sales is over-taxed managing/maintaining distribution

What customers want

- Visibility and Control of what they're subscribed to
- An understanding of the content that comes from an Alert
- Customizable delivery times for when they receive Research
- Make self subscription easier, informative and detailed

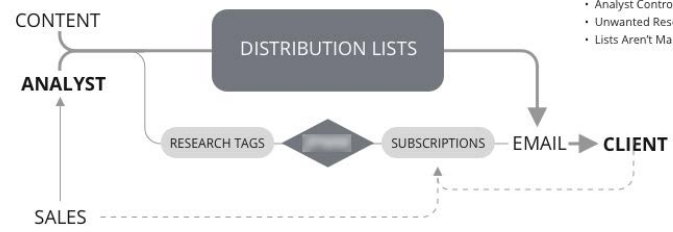
Workflows and rough concepts explored with stakeholders



Analyst	Publications	Research Type	Tags	Company(s)	Region(s)	City(s)

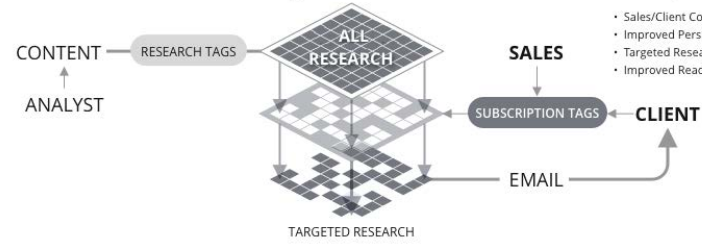
Research Type	Company(s)	Analyst	Publications	Tags	Region(s)	City(s)

Current State - Distribution Lists



- Pain Points**
- Analyst Controls Lists
 - Unwanted Research
 - Lists Aren't Maintained

End State - Research Delivered Based on Tags



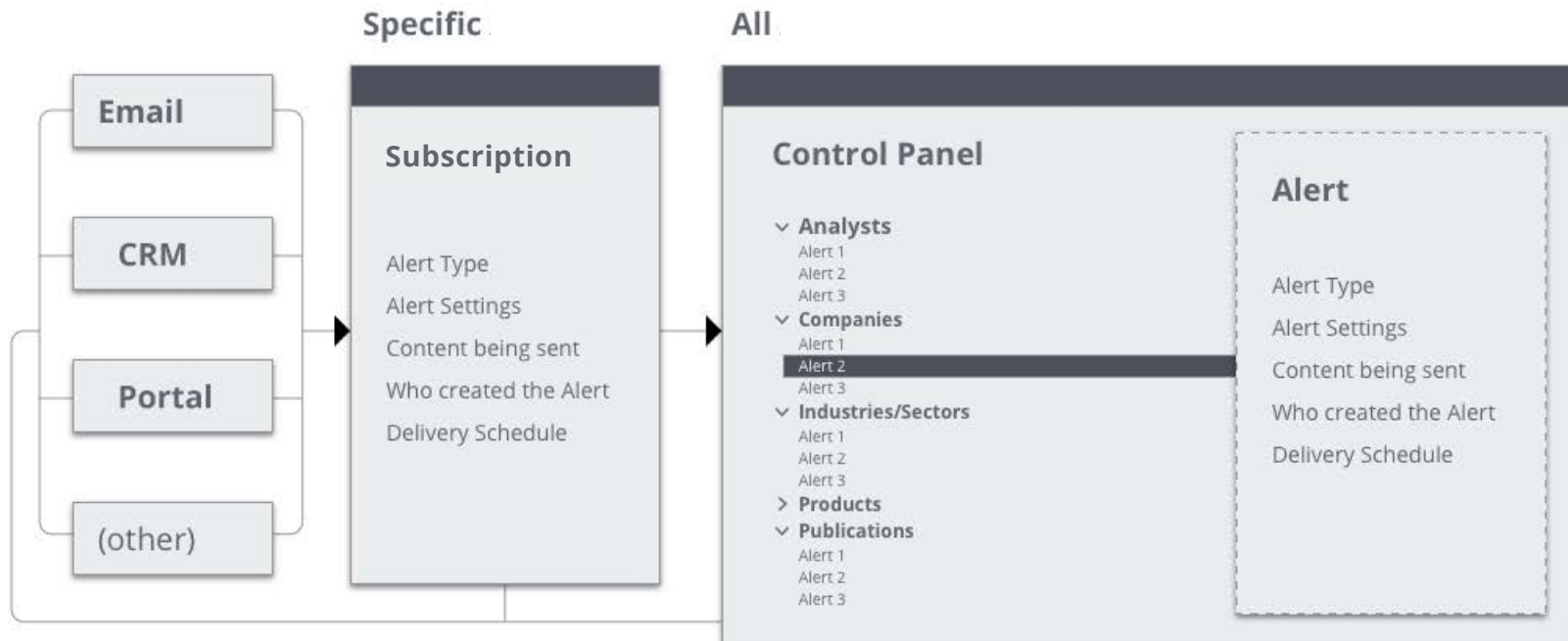
- Advantages**
- Sales/Client Controlled
 - Improved Personalization
 - Targeted Research
 - Improved Readership

UI concept iterations taken further to explore information hierarchies and navigation

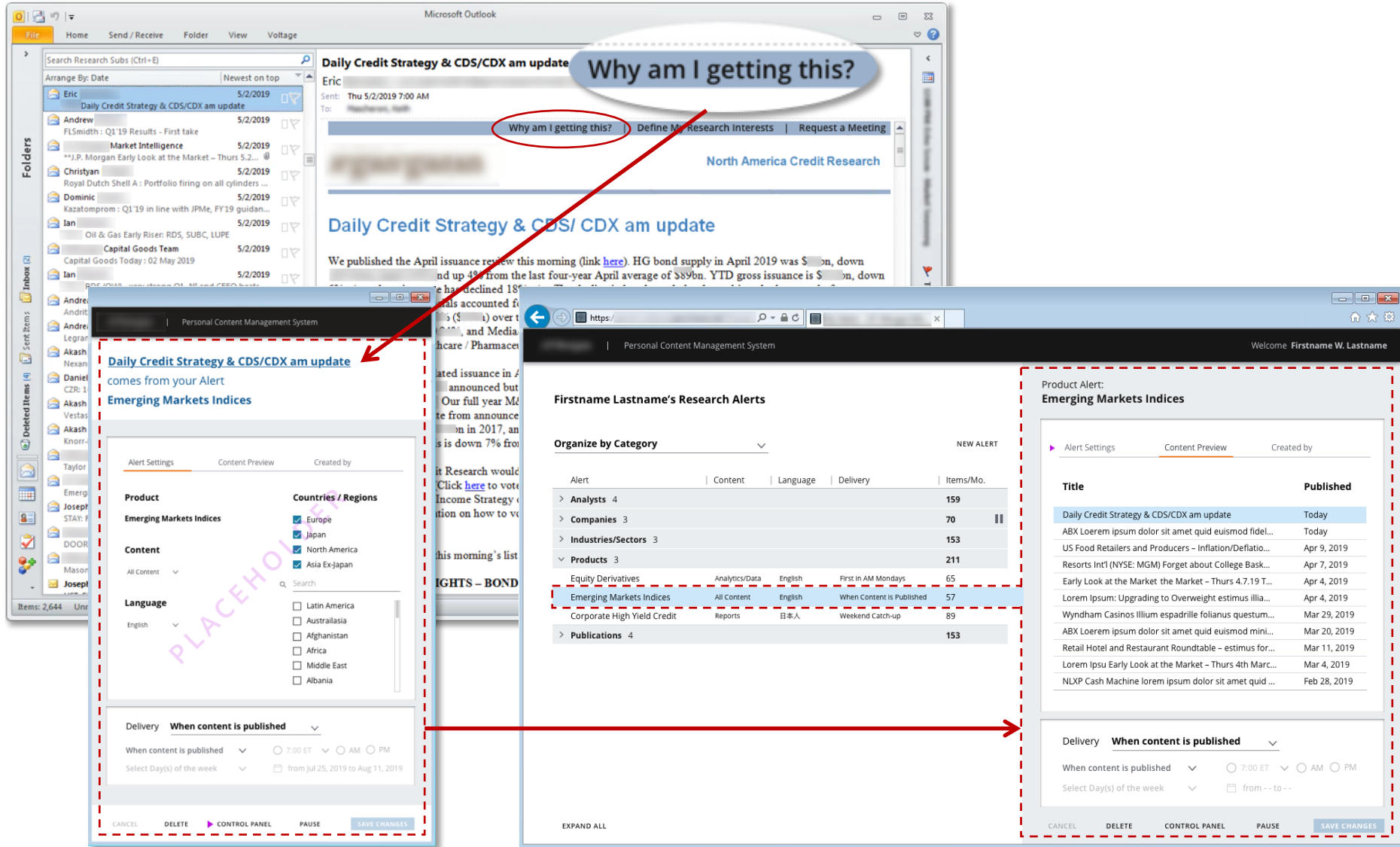
Prototype to MVP

Framework of the solution

- Improve the subscription control panel
- Provide search across categories
- Make subscriptions editable
- Show content a subscription will deliver
- Show how much content a subscription delivers
- Promote discovery of new research
- Provide access to the control panel from CRM



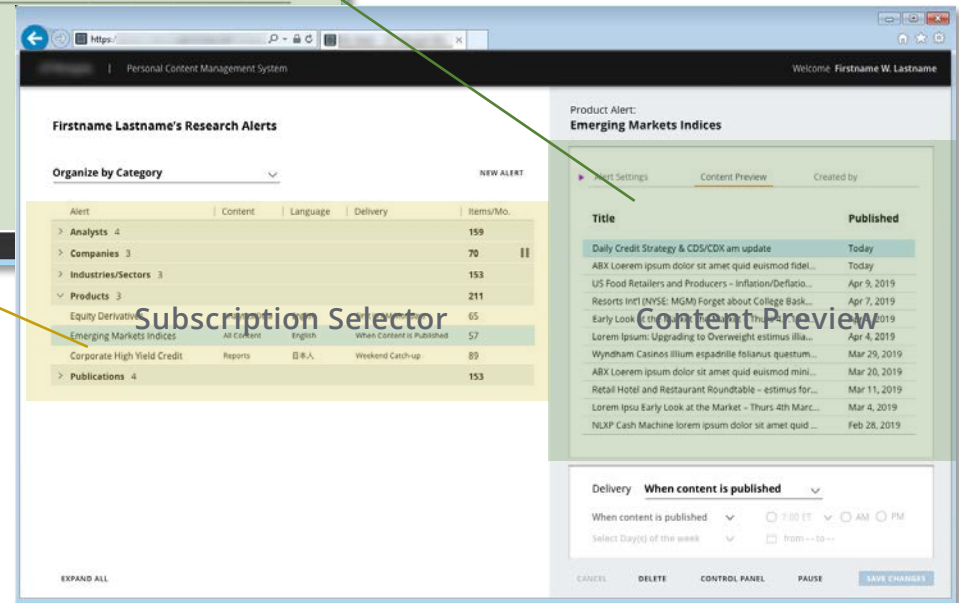
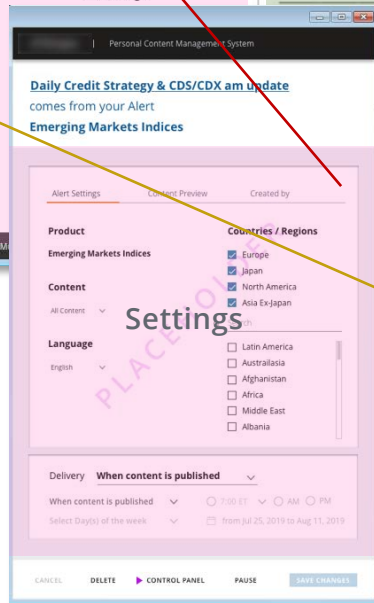
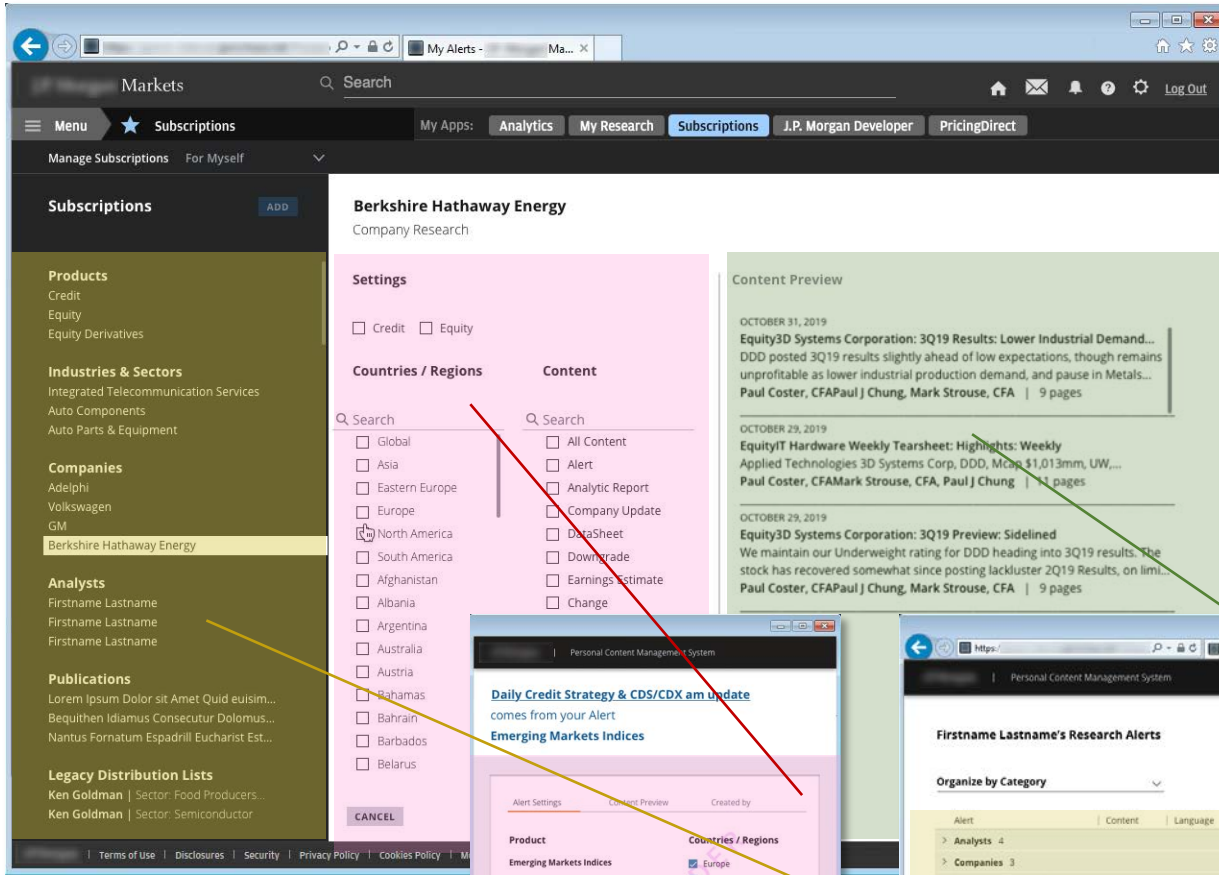
Prototype design, linking email research to Control Panel that docks in All Subscriptions Panel



Mini Subscription Panel

As docked in Subscriptions Control Panel

Draft components were factored into a single Control Panel



Settings

Subscription Selector

Content Preview

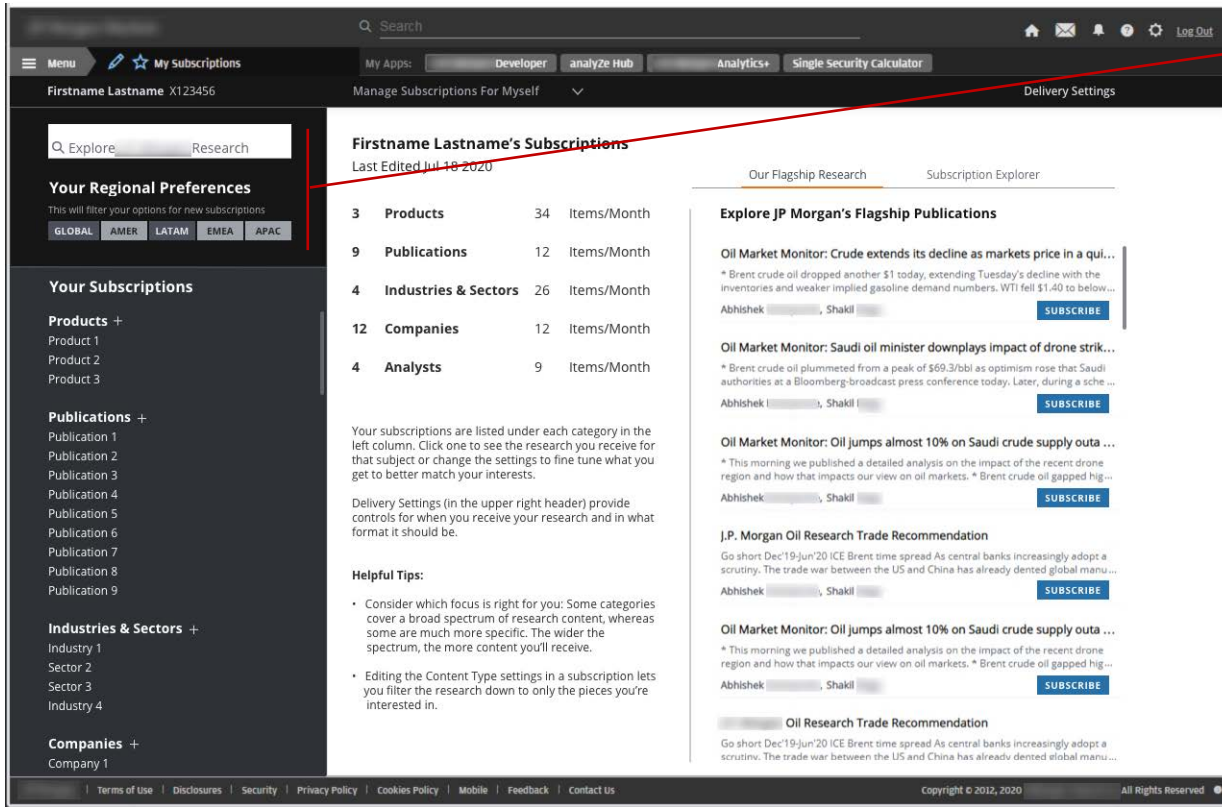
Where it lives: My Research Subscriptions in context to the Research Portal

The screenshot shows the 'Markets' page with the 'My Subscriptions' tab selected. The page is divided into several sections: 'FEATURE PRODUCTS' with an 'Auto Conference' banner, 'MARKET MOVERS' with a table of market data, and 'FEATURED RESEARCH' with articles on strategy, economics, and equities. The 'My Subscriptions' tab is circled in red, indicating the focus of the subsequent screenshot.

The screenshot shows the 'Subscriptions' management page for Berkshire Hathaway Energy. The page is divided into several sections: 'Subscriptions' with an 'ADD' button, 'Products' (Credit, Equity, Equity Derivatives), 'Industries & Sectors' (Integrated Telecommunication Services, Auto Components, Auto Parts & Equipment), 'Companies' (Adelphi, Volkswagen, GM, Berkshire Hathaway Energy), 'Analysts' (Firstname Lastname), 'Publications' (Lorem Ipsum Dolor sit Amet Quid euisim...), and 'Legacy Distribution Lists' (Ken Goldman | Sector: Food Producers...). The 'Settings' section includes checkboxes for 'Credit' and 'Equity'. The 'Countries / Regions' section has a search bar and a list of countries/regions with checkboxes. The 'Content' section has a search bar and a list of content types with checkboxes. The 'Content Preview' section shows a list of recent content items with their titles, authors, and page counts.

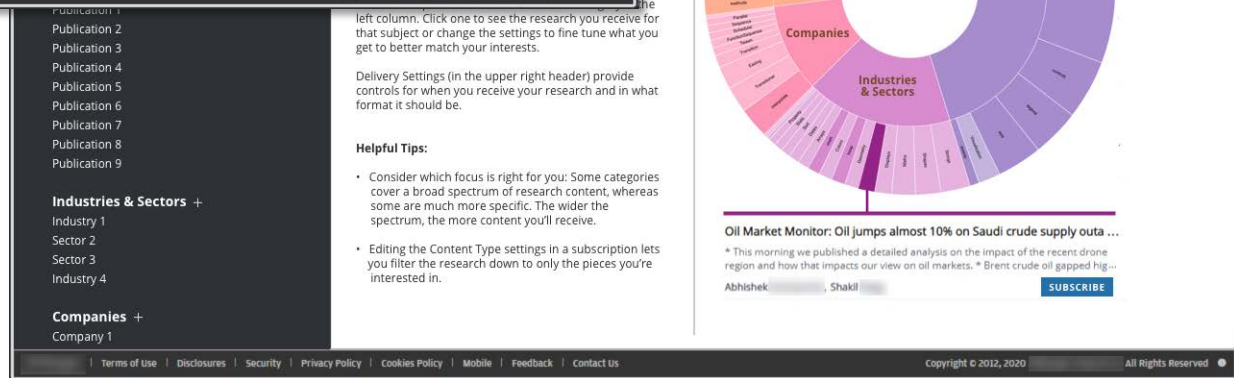
- Portal containing the control panel
- Create subscription by category
- Edit existing subscriptions
- Preview recent content delivered

Finalized MVP Design*



Landing page with universal search and default Regional settings

*Pending concept for a navigable sunburst diagram to explore content and learn how it's organized



Lessons Learned

We moved the needle, but there's a lot more to do

We added to what was there

We had to accommodate a lot of constraints that couldn't be solved right away. So we focused on the control panel as the hub into which other features/functions could be incorporated.

Translating distribution lists to subscriptions is more complex than expected

Distribution lists are not well maintained. The same ones are used for many purposes. Heuristic analysis was difficult to achieve. It's a slow, highly manual process with very little tolerance for error.

Analysts sometimes perceive it as a threat

They were loath to allow them granular control of subscriptions to get only what they wanted, and skeptical of using taxonomies to define them

What I wish I had done differently

Pushed to **overhaul the information architecture** as a foundation to improving the subscription workflows.

I might have been **too willing to compromise** with management and tech. I might have achieved more innovative solutions and avoided bad compromises.

Conducted more user testing of the design. Pressure to demo the MVP build gave users all the answers, overshadowing discovery of where the UI needed refinements

Conducted research with internals – the primary users for the near term – to learn their pain points and ways of curating research subscriptions for customers

Insisted on funding for a visual designer to collaborate with and hand concepts off to

The MVP is Live July 2020 | A Quick Tour

Landing Page showing regional preferences, dashboard, existing subscriptions and promoted content

The screenshot shows a web browser window with the URL `/#research.my_subscriptions`. The page features a dark navigation bar with a search bar, a menu, and several application tabs: 'My Subscriptions' (active), 'Developer', 'analyZe Hub', 'Analytics+', and 'Single Security Calculator'. Below the navigation bar, there are links for 'Manage subscriptions', 'For Myself', 'What's New', 'Feedback', and 'Delivery Settings'.

The main content area is divided into three columns:

- Left Column: Regional Preferences**
 - Section: **Your Regional Preferences** (This will filter your options for new subscriptions)
 - Buttons: GLOBAL, AMER, LATAM, EMEA, APAC
 - Section: **Your Subscriptions**
 - Section: **Industries & Sectors +**
 - Section: **Companies +**
 - Section: **Analysts +** (listing Joyce ang, Noelle, Bruce, Marko)
- Middle Column: Subscriptions Dashboard**
 - Section: **[User]'s Subscriptions** (Last Edited Jun 15 2020)
 - Table:

Count	Category	Count	Unit
2	Products	565	Items/Month
4	Publications	39	Items/Month
0	Industries & Sectors	-	
0	Companies	-	
4	Analysts	59	Items/Month
 - Text: Your subscriptions are listed under each category in the left column. Click one to see the research you receive for that subject or change the settings to fine tune what you get to better match your interests.
 - Text: Delivery Settings (in the upper right header) provide controls for when you receive your research and in what format it should be.
 - Section: **Helpful Tips:**
 - Consider which focus is right for you: Some categories cover a broad spectrum of research content, whereas some are much more specific. The wider the spectrum, the more
- Right Column: Promoted Content**
 - Section: **Explore JP Morgan's Flagship Publications**
 - Section: **Asia Credit Outlook and Strategy 2020: The Year of A Nimble Rat**
 - Text: Summary View We believe that Asia credit investors will have to be nimble in the Year of Rat under the China Lunar calendar. Despite lingering uncertainties surrounding trade conflicts and global growth, fundamentals for Asia credit are largely stable, except for a few weak spots. Technicals...
 - Button: **SUBSCRIBE**
 - Text: Soo [redacted], Varun [redacted], CFA, Matthew [redacted], +3
 - Section: **EM Asia Local Markets Compass 2020 Mid-Year Outlook: Weak (ex-China) recovery, bumpy politics, narrower reflation gains**
 - Text: Overview: For the second time this year, markets are embarking on a semester of trading with hopes of a cyclical revival, but downbeat projections of U.S. business spending in 2H (-6.6% FY20) do not offer much reason for optimism for Asian markets, especially as easy money from fading 1Q price di...
 - Button: **SUBSCRIBE**
 - Text: Arindam [redacted], Jonathan [redacted], Arthur [redacted] +2
 - Section: **Asia 2020 Outlook: Stocks and Themes for the Year of the Rat**
 - Text: Asia Equity Market Outlook 2020 - Key Takeaways MSCI Asia ex-Japan forecasts Price Target: end-2020 700, with a high of 750 in 1H Expected Range: 630-750 EPS

The footer contains links for Terms of Use, Disclosures, Security, Privacy Policy, Cookies Policy, Mobile, Feedback, and Contact Us, along with copyright information: Copyright © 2012, 2020 All Rights Reserved.

User can search across categories to create a subscription

The screenshot shows a web application interface for managing research subscriptions. The browser address bar displays `/#research.my_subscriptions`. The navigation bar includes a search bar, a menu, and several tabs: **My Subscriptions** (active), **Developer**, **analyZe Hub**, **Analytics+**, and **Single Security Calculator**. Below the navigation bar, there are links for **Manage subscriptions**, **For Myself**, **What's New**, **Feedback**, and **Delivery Settings**.

Explore Research modal (Search: `cu`):

- Products**
 - Currency Cash
 - Currency Derivatives
 - Currency Futures
- Publications**
 - Cross Currency Bond Report
 - EM Corporate Cross Currency Report
 - EM USD 10s30s Spread Curve Report
 - High Grade Bond Curve Report
 - High Grade CDS Curve Report
 - High Yield CDS Curve Report
 - Key Currency Views
- Industries & Sectors**
 - Asset Management & Custody Banks
- Companies**

My Subscriptions (Last Edited Jun 15 2020)

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4	Publications	39	Items/Month
0	Industries & Sectors	-	
0	Companies	-	
4	Analysts	59	Items/Month

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Explore JP Morgan's Flagship Publications

Asia Credit Outlook and Strategy 2020: The Year of A Nimble Rat

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Alternatively the user can hover on a category (eg: Industries & Sectors) to create a subscription

The screenshot shows a web application interface for managing research subscriptions. The browser address bar shows the URL `/#research.my_subscriptions`. The page has a dark header with navigation options like 'Menu', 'My Subscriptions', and 'My Apps'. Below the header, there are tabs for 'My Subscriptions', 'Developer', 'analyZe Hub', 'Analytics+', and 'Single Security Calculator'. The main content area is divided into a left sidebar and a main content area. The sidebar contains sections for 'Your Regional Preferences' (GLOBAL, AMER, LATAM, EMEA, APAC), 'Your Subscriptions', and 'Companies +'. The 'Your Subscriptions' section is currently expanded, showing a table of categories and their respective item counts. The 'Industries & Sectors' category is highlighted with a 'SUBSCRIBE' button. The main content area displays the user's current subscriptions, a list of research articles with 'SUBSCRIBE' buttons, and a 'Helpful Tips' section.

My Subscriptions

Last Edited Jun 15 2020

2	Products	565	Items/Month
4	Publications	39	Items/Month
0	Industries & Sectors	-	
0	Companies	-	
4	Analysts	59	Items/Month

Industries & Sectors + SUBSCRIBE

Your Subscriptions

Your subscriptions are listed under each category in the left column. Click one to see the research you receive for that subject or change the settings to fine tune what you get to better match your interests.

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On click, the screen refreshes to show all a tree list Industries & Sectors

My Research Subscriptions - J x +

/#research.my_subscriptions

Search

Menu My Subscriptions My Apps: My Subscriptions Developer analyZe Hub Analytics+ Single Security Calculator

Manage subscriptions For Myself What's New Feedback Delivery Settings

Explore Research

Your Regional Preferences
This will filter your options for new subscriptions
GLOBAL AMER LATAM EMEA APAC

Your Subscriptions

Industries & Sectors +

Companies +

Analysts +
Joyce ang
Noelle
Bruce
Marko

Subscribe to Industry & Sector Research
GLOBAL

Filter Industries & Sectors by Coverage Group
 Credit + Equity Credit Only Equity Only

Search

- Communication Services
- Consumer Discretionary
- Consumer Staples
- Energy
- Financials
- Health Care
- Industrials
- Information Technology
- Materials
- Real Estate

CANCEL NEXT

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User makes selects an Energy sub-sector, which appears in the right panel, showing approximate items/month

The screenshot shows a web application interface for managing research subscriptions. The browser tab is titled "My Research Subscriptions - J x" and the URL is "#research.my_subscriptions". The page has a dark theme with a navigation bar at the top containing "Menu", "My Subscriptions", and "My Apps:" with sub-apps like "Developer", "analyZe Hub", "Analytics+", and "Single Security Calculator".

The main content area is titled "Subscribe to Industry & Sector Research" and is divided into two panels:

- Left Panel: Filter Industries & Sectors by Coverage Group**
 - Radio buttons for "Credit + Equity" (selected), "Credit Only", and "Equity Only".
 - A search bar.
 - A list of industry categories with checkboxes:
 - Communication Services
 - Consumer Discretionary
 - Consumer Staples
 - Energy (expanded)
 - Energy Equipment & Services (expanded)
 - Oil & Gas Drilling
 - Oil & Gas Equipment & Services** (checked and highlighted with a dashed blue border)
 - Oil, Gas & Consumable Fuels
 - Financials
 - Health Care
- Buttons for "CANCEL" and "NEXT".

- Right Panel: Selected Industry & Sector**
- A single selection: "Oil & Gas Equipment & Services" with "85 Items/Month" and icons for delete and expand.

The left sidebar contains sections for "Your Regional Preferences" (GLOBAL, AMER, LATAM, EMEA, APAC), "Your Subscriptions", "Industries & Sectors +", "Companies +", and "Analysts +".

At the bottom, there is a footer with links for "Terms of Use", "Disclosures", "Security", "Privacy Policy", "Cookies Policy", "Mobile", "Feedback", and "Contact Us", along with copyright information "Copyright © 2012, 2020" and "All Rights Reserved".

User selects another sub-sector, which appears below the first as a collapsible row

The screenshot shows a web application interface for "My Research Subscriptions". The browser address bar displays "#research.my_subscriptions". The page features a dark navigation bar with a "Menu" button and "My Subscriptions" link. Below the navigation bar, there are tabs for "My Apps:" including "My Subscriptions", "Developer", "analyZe Hub", "Analytics+", and "Single Security Calculator". The main content area is titled "Subscribe to Industry & Sector Research" and includes a "GLOBAL" filter. A "Filter Industries & Sectors by Coverage Group" section offers radio buttons for "Credit + Equity", "Credit Only", and "Equity Only". A search bar is present, and a list of industry categories is shown with checkboxes. The "Oil & Gas Refining & Marketing" option is selected and highlighted with a dashed blue border. To the right, a "Selected Industries & Sectors" list shows "Oil & Gas Equipment & Services" (85 Items/Month) and "Oil & Gas Refining & Marketing" (76 Items/Month). A mouse cursor is positioned over the "Oil & Gas Refining & Marketing" item in the list. The page footer contains links for "Terms of Use", "Disclosures", "Security", "Privacy Policy", "Cookies Policy", "Mobile", "Feedback", and "Contact Us", along with copyright information for 2012 and 2020.

Each row can be expanded to show clickable examples of recent content that subscription delivered

The screenshot displays a web application interface for "My Research Subscriptions". The browser address bar shows the URL "#research.my_subscriptions". The page features a dark navigation bar with a search bar and a "Log Out" link. Below the navigation bar, there are tabs for "My Subscriptions", "Developer", "analyZe Hub", "Analytics+", and "Single Security Calculator". The main content area is divided into several sections:

- Your Regional Preferences:** This section allows users to filter their options for new subscriptions by region, with buttons for GLOBAL, AMER, LATAM, EMEA, and APAC.
- Your Subscriptions:** This section provides a list of current subscriptions, including "Industries & Sectors +", "Companies +", and "Analysts +".
- Subscribe to Industry & Sector Research:** This section includes a search bar and a filter for "Filter Industries & Sectors by Coverage Group". The filter options are "Credit + Equity" (selected), "Credit Only", and "Equity Only".
- Selected Industries & Sectors:** This section displays a list of selected industries and sectors, including "Oil & Gas Equipment & Services" (85 Items/Month) and "Oil & Gas Refining & Marketing" (76 Items/Month). Each item has a trash icon and an expand/collapse icon.

The "Oil & Gas Refining & Marketing" section is expanded, showing a news article titled "Canada Refining: Runs Flat Again W/W, Cracks Mixed". The article text reads: "Weekly data for Canadian crude runs for the week ending August 18th were released last night, indicating a decrease w/w to 1,312kbpd (67% utilization). Runs in Quebec and Eastern Canada saw a decrease w/w to 480kbpd, below the seasonal lows at 56% utilization. Runs in Ontario saw an increase w/w ...". The article is dated "28 Aug 20" and has "Pages 7". The author information includes "Phil [redacted] CFA, John [redacted], CFA, Nicholas J [redacted], +1".

At the bottom of the page, there is a "CANCEL" button and a "NEXT" button. The "NEXT" button is highlighted with a mouse cursor.

The footer of the page contains the following text: "Terms of Use | Disclosures | Security | Privacy Policy | Cookies Policy | Mobile | Feedback | Contact Us" on the left, and "Copyright © 2012, 2020" and "All Rights Reserved" on the right.

User then chooses only the locations and content types they want (which also reduces the content count)

The screenshot displays a web application interface for managing research subscriptions. The browser address bar shows the URL `/#research.my_subscriptions`. The page title is "My Research Subscriptions - J x". The navigation bar includes "Menu", "My Subscriptions", and "My Apps:" with tabs for "My Subscriptions", "Developer", "analyZe Hub", "Analytics+", and "Single Security Calculator". The main content area is titled "Industry & Sector Research Subscriptions" and "Multiple Industries & Sectors".

Settings

Coverage Group

Credit + Equity Credit Only Equity Only

Location(s)

Search

All Locations
 Africa
 Asia Pacific
 Europe
 Latin America
 Middle East
 North America
 Afghanistan
 Albania
 Algeria

Content Type(s)

All (excl. Analytics & Data)
 Alert
 Company Update
 Downgrade
 Earnings Estimate Change
 Industry Analysis
 Initiation
 Reference/Primer
 Strategy
 Termination

Analytic Reports
 Data Sheets

Selected Industries & Sectors

Oil & Gas Equipment & Services	36 Items/Month	🗑️ ^
Oil & Gas Refining & Marketing	11 Items/Month	🗑️ v

Parkland Corp: Sticky Cost Saves Improve Long-Term Picture

PKI's 2Q result was a very solid beat driven by significant cost saves in all segments + corporate. The sustainable portion of \$50-70mm in annual saves should provide a structural boost to a business that could face demand headwinds well into 2021. Overall, we now see mid-cycle 2022 EBITDA of \$1....

07 Aug 20 | Pages 10
John [redacted], CFA

HollyFrontier: 2Q20: Shifting to Renewable Diesel, Likely Debt Issuer in Next 6-12 Months, Liquidity Remains Ample

2Q20 Results (C\$ in millions) Revenue: \$2,063 (-39% QoQ / -57% YoY

Buttons: CANCEL, BACK, NEXT (highlighted with mouse cursor)

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User finalizes language and delivery choices, then clicks subscribe

The screenshot shows a web browser window with the URL `/#research.my_subscriptions`. The page is titled "My Research Subscriptions" and features a dark navigation bar with a search bar and various menu items. The main content area is divided into several sections:

- Industry & Sector Research Subscriptions**: Multiple Industries & Sectors
- Coverage Group**: Radio buttons for "Credit + Equity" (selected), "Credit Only", and "Equity Only".
- Location(s)**: "North America"
- Content Type(s)**: "Earnings Estimate Change", "Downgrade", and "Company Update".
- Language**: "English" (with a dropdown arrow).
- Delivery**: "When Published" (with a dropdown arrow).
- Created by**: A blurred text field.

On the right side, there is a section titled "Selected Industries & Sectors" with a list of items:

- Oil & Gas Equipment & Services (36 Items/Month)
- Oil & Gas Refining & Marketing (11 Items/Month)

Below the list, there is a preview of a research article titled "Parkland Corp: Sticky Cost Saves Improve Long-Term Picture". The preview includes a summary of the article's content, the date "07 Aug 20", and the author "John [redacted], CFA".

At the bottom of the configuration panel, there are three buttons: "CANCEL", "BACK", and "SUBSCRIBE". A mouse cursor is hovering over the "SUBSCRIBE" button.

The footer of the page contains links for "Terms of Use", "Disclosures", "Security", "Privacy Policy", "Cookies Policy", "Mobile", "Feedback", and "Contact Us". The copyright notice is "Copyright © 2012, 2020" and "All Rights Reserved".

The new subscriptions appear in the left panel, where they can always be accessed to make changes

My Research Subscriptions - J X +

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's Subscriptions

Last Edited Aug 28 2020

2	Products	565	Items/Month
4	Publications	39	Items/Month
2	Industries & Sectors	47	Items/Month
0	Companies	-	
4	Analysts	59	Items/Month

Your subscriptions are listed under each category in the left column. Click one to see the research you receive for that subject or change the settings to fine tune what you get to better match your interests.

Delivery Settings (in the upper right header) provide controls for when you receive your research and in what format it should be.

Helpful Tips:

- Consider which focus is right for you: Some categories cover a broad spectrum of research content, whereas some are much more specific. The wider the spectrum, the more

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Asia Credit Outlook and Strategy 2020: The Year of A Nimble Rat

Summary View We believe that Asia credit investors will have to be nimble in the Year of Rat under the China Lunar calendar. Despite lingering uncertainties surrounding trade conflicts and global growth, fundamentals for Asia credit are largely stable, except for a few weak spots. Technicals...

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EM Asia Local Markets Compass 2020 Mid-Year Outlook: Weak (ex-China) recovery, bumpy politics, narrower reflation gains

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Asia Equity Market Outlook 2020 – Key Takeaways MSCI Asia ex-Japan forecasts Price Target: end-2020 700, with a high of 750 in 1H Expected Range: 630-750 EPS

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Measuring Success

What we achieved

It's **easier to discover** new research

Content can be previewed and users are able to understand the **content count** a subscription sends

Subscriptions can be fine tuned to improve relevance

What we're seeing

Direct **access from CRM is a big hit**

Editable subscriptions **inspire dialog with customers**

Subscription **content count is helping** avoid oversubscribing and make more tailored choices for customer subscriptions

Pilot users are happy

What success will look like

Fewer emails will be sent

What's sent being opened more

Fewer calls/less time spent by staff managing subscription issues

More subscriptions created by customers

Comprehensive insights to customer interests

Long tail marketing opportunities

Thank You