



# Case Study **Trekk Cross-Media & Yoffi** **Charter Bank**



## Customer

[www.trekk.com](http://www.trekk.com)  
[www.yoffi.com](http://www.yoffi.com)  
[www.charterco.com](http://www.charterco.com)

## Challenge

Generate new investments for Charter Bank

Print multiple campaigns in one run, pre-sorted for mailing discounts

## Solution

Standardizing all campaigns with one database schema

One uPlan Plan file, including logic for all campaigns

Layout of each campaign in a separate layer of a single InDesign file

Short runs folded into one longer run

New campaigns added easily

## Results

10x increase in new investments for Charter in just 7 months

A loyal, repeat customer for Trekk

## XMPie Inc.

Headquarters

XMPie Ltd.

Trekk Cross-Media is a full-service marketing, communication and promotional agency that provides a unique blend of strategic business thinking, marketing creativity, and best-of-breed technologies. Their team of marketing professionals develops comprehensive programs that coordinate online and offline information to bring brands, customers and organizations together. Trekk's business partner, Yoffi, has developed a state-of-the-art production facility and workflow that combine traditional print experience and emerging print technologies to optimize direct marketing strategies that strengthen customer relationships.

New Mexico's financial resource since 1976, Charter offers a full range of financial products through Charter Commercial Mortgage, Charter Mortgage, Charter Bank and Charter Insurance Services.

Charter wanted to expand its presence, while positioning itself as a high quality regional bank. Its challenge was to develop effective campaigns for all of its services that would generate the capital it needed for that expansion. The challenge for Trekk was to create a set of on-going personalized direct mail campaigns for their new customer, allowing the bank to speak to different segments of target audience with personally relevant text and graphics. Each week, Charter selects a different segment of their database for these mailings, in quantities of around 5000 names. However, these records are chosen on criteria other than their relevance to any single business division or marketing campaign. Therefore, there is no way to predict how many mailing pieces for any given campaign (i.e. the CD campaign or the Mortgage campaign) will be run in any given week. This could result in a number of short run jobs, ranging in quantities anywhere from one to five-thousand. Additionally, both businesses wanted to sort the entire weekly database specifically for bulk-mail standards to qualify for the pre-sort mailing discounts and eliminate the time and expense of sorting by hand. To accomplish this goal, Trekk had to figure out how to intermix the postcards from different campaigns into a single mail-sorted print run.

Trekk created a postcard mailer that targeted three separate groups of would-be investors with an attractive rate on certificates of deposit. The postcard greeted recipients by name and the message and graphics were customized for current CD customers, former CD customers and existing mortgage loan customers. A second campaign for the Mortgage division targeted customers who were paying high interest on their home loans, enticing them to refinance their mortgage through Charter. With the clever use of a combination of unique features in the XMPie® PersonalEffect™ system, Trekk solved the production issue. Because PersonalEffect's underlying ADOR™ technology keeps the data and design separate until print time, Trekk decided to standardize on one database schema for all campaigns. Using XMPie uPlan™, they created one Plan file which includes the logic for all campaigns. In Adobe® InDesign® they created a 2-page (front and back), multi-layer document, constructed so that the entire visual layout for any single campaign exists within a specific layer. XMPie uCreate™ and "Visibility ADOR Objects" allow them to make a layer (campaign) view or hide based on the logic in the Plan file. For example, if the data in a record triggered the CD campaign, then only layer 1 would view, whereas if the data triggered the Mortgage campaign, then only layer 2 would show. The Plan file and image assets were uploaded to XMPie uProduce™ once, so they simply link to each week's pre-sorted database, produce, cut and mail. PersonalEffect made it practical, efficient and economical to consolidate the print runs into one.

For each new campaign for Charter, Trekk edits the Plan file in uPlan and adds one more layer to their InDesign document, which integrates these postcards into the weekly print run.

The variable data campaigns, highly-targeted through the lists, personalization and customization, literally put money in the bank for Charter. The first CD campaign generated \$15 million in new investments. What surprised Charter the most, however, was how quickly recipients responded. Customers began arriving at branch locations holding the postcards just two days after they were mailed. The mortgage campaign brought in \$8 million in refinances, and allowed Charter to retain customers in the face of increased competition. In the seven months since Charter has been using Trekk for these campaigns, new investments have increased tenfold! Thanks to the production efficiencies possible with PersonalEffect, Trekk is able to easily add new campaigns for Charter to the weekly production run, thereby escalating Trekk's VDP business and locking in their customer's loyalty.

### one to one in one™

41 Madison Avenue, 25th Floor, New York, NY 10010 USA  
Tel.: (212) 479 5137, Fax.: (212) 479 5187 [www.xmpie.com](http://www.xmpie.com) [info@xmpie.com](mailto:info@xmpie.com)

12 Hamelacha Street, P.O.B. 8687, Poleg Technology Park, Netanya, Israel 42504  
Tel.: +972 9 885 6750, Fax.: +972 9 885 6747

All rights reserved. 2005 XMPie, the XMPie logo, uDirect, uPlan, uCreate, uProduce, uChart, PersonalEffect, ADOR, XLIM and the slogan "one to one in one" are either trademarks or registered trademarks of XMPie. 07.07.2005

