Solien®

// Case Study /Schwab Promotional System

//CHALLENGE

➢ Charles Schwab & Company needed to leverage the web to drive lead generation. They required the ability to deliver customized and compelling promotional experiences that would ultimately result in the conversion of leads to customers.

➢ Schwab also needed to have a 360° view of each user's experience in the online arena in order to gain a measurable understanding of what creates effective lead conversion.

➢ Finally, Schwab required built in agility so that they could convert what they learned through measurement into modified or new promotional experiences.

### //TECHNOLOGY

Microsoft Windows 2000 Server

Microsoft SQL Server 2000

Microsoft Visual Basic 6.0

Microsoft Active Server Pages 3.0

Microsoft MSXML 4.0

//SOLUTION

➢ Each promotion is divided into publishable areas, allowing Schwab tremendous flexibility in creating unique and targeted user experiences. A browser based publishing tool provides robust, rules-based promotion management.

➢ The system performs rich data collection and interfaces directly with Schwab's existing mainframe-based customer prospecting, fulfillment and third party content provider systems to provide a seamless user experience.

➢ Solien developed and implemented a data warehouse driven reporting application to provide Schwab with the information necessary to "close the loop" on lead conversion.
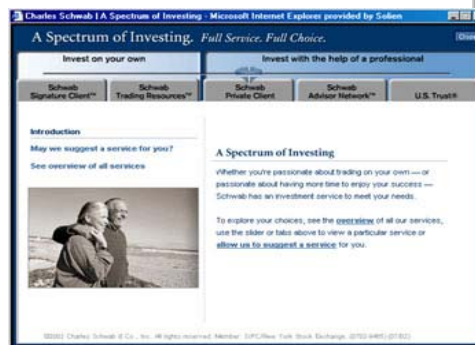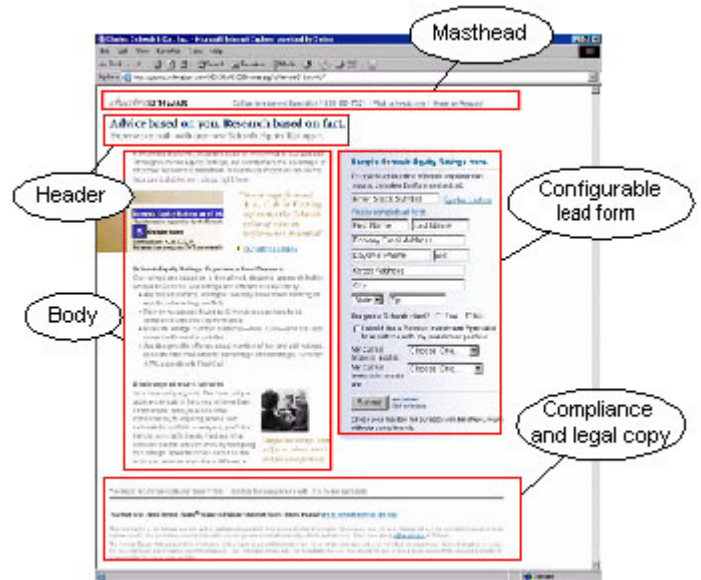
//RESULTS

See the system in action by visiting schwab.com and clicking on "Try Schwab Equity Ratings™".

Solien designed and developed a promotional application complete with dynamic, rules-based, publishable content, custom reporting tools, data import and integration capabilities and more. Schwab currently uses the system to manage multiple, concurrent promotions, and Solien continues to enhance the system to accommodate newly identified needs. The system provides Schwab with the ability to quickly deploy and fine tune promotional campaigns, improving their capacity to convert leads into valuable customers.