

CASE STUDY

How a FinTech Leader Connected an 80,000 - Employee Global Remote Workforce Through Data-Driven Communications Using PoliteMail

This Fortune 500 company has been at the forefront of the FinTech movement since 1968. More than six decades later, their systems manage more than half of the world's wealth, moving twice as much yearly as their top three competitors combined.

They implemented PoliteMail at the height of the pandemic, just as they had closed 300 campuses and sent employees home.

With more than 80,000 team members spread across 50+ countries, they had already laid the groundwork for a remote working model.

Yet, leadership needed data-driven assurance that they were engaging team members and offering them optimal support.

After a preliminary analysis, they discovered they needed more design flexibility, automation, and real-time metrics to measure the impact of their messaging.

Here's how they transformed outreach efforts into a data-driven system that was simple, measurable, branded, and effective.

Eliminated Challenges with Distribution Lists

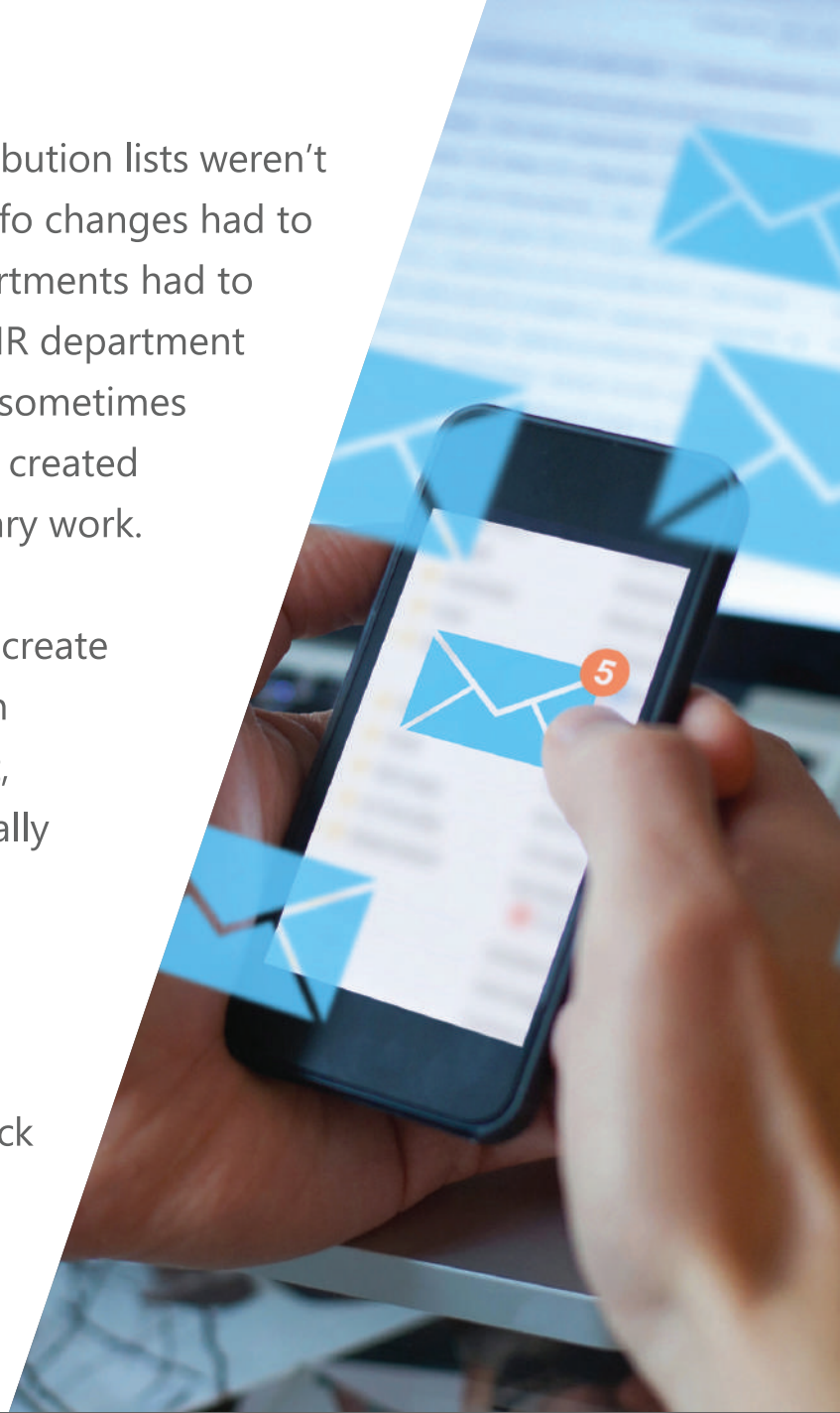
Before PoliteMail, roughly 80,000 daily communications were sent through its primary messaging tool, Outlook. Because of the platform's limitations, distribution lists had to be uploaded by HR, and the communications team could only send to 10,000 recipients per day.



To further complicate matters, distribution lists weren't always accurate, and any contact info changes had to be manually updated. Worse, departments had to submit formal list requests to the HR department and wait for them to be uploaded, sometimes taking days. That inefficient system created delays, inaccuracies, and unnecessary work.

With PoliteMail, users were able to create their own segmented lists based on attributes like location, department, etc. and those lists were automatically updated every night so they were always up to date, eliminating any manual work

They now report higher open and click rates,, increased read times, more engagement, and a streamlined messaging process.



Built-in Metrics that Measure Impact to Determine what Works Best

When the pandemic hit, they went fully remote and closed down more than 300 campuses overnight. From a communications perspective, the human resources and communications departments were employees' single lifeline to the company.

Leadership knew they had to engage team members but needed more information about user behavior to do so.

Were readers opening emails and clicking on links?
If so, when? If not, why?

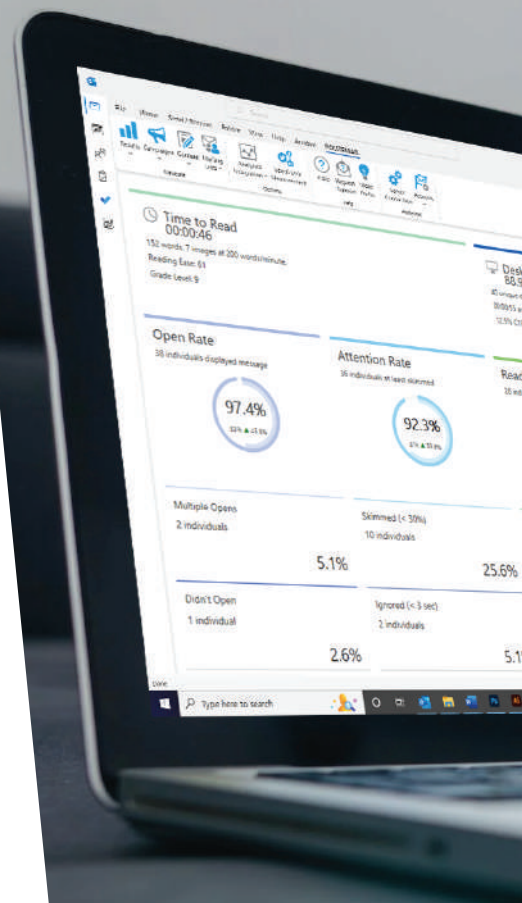
Outlook couldn't answer these questions with detailed analytics.

But once they integrated PoliteMail with Outlook, the communications team could track any email broadcast then review the metrics to determine what was working and what wasn't.

What's more, they could review that real-time data inside Outlook without having to log in, remember passwords, or wade through an inbox flooded with open notifications.

PoliteMail's analytics showed who was opening and clicking as well as how much time recipients spent engaging with messages. One key lesson learned was that many messages were too long, as evidenced by where people were dropping off. The communications team adjusted by reducing the length of messages, which resulted in more of the content being consumed.

Overall, the team gained a nuanced understanding of their employees' behavior, laying the groundwork for improved, data-driven communications with higher engagement.



"Instead of telling leadership how many people received our messages, we now offer real-time metrics that show who's reading and engaging. I can't imagine going back to where we were."

Senior Director of HR

Tailored Communications to Employees' Preferences

Since email will always play a key role in their internal communications strategy, they leveraged PoliteMail's engagement metrics to give leadership clearer insight into why some employees were engaging with emails and others weren't.

The organization has a diverse workforce spanning five generations, and each team member communicates differently.

Metrics revealed that one employee segment used email as its preferred communication platform while others didn't. After surveying team members, they discovered why.



Some employees favored email because of its convenience and familiarity - the inbox was always one click away, and these users were comfortable with the tool.

Yet, a significant number of employees preferred communicating via the company's social media channels, intranet, and video platforms.

This information told leadership two things:

1. They had to communicate with employees on their preferred channels.
2. Their emails needed to be as aesthetically pleasing as they were useful.



Appearances Do Matter

While the communications team relied on Outlook, they had outgrown the platform's limited design options. So, while emails contained valuable content, messages arrived in inboxes without headers, videos, or graphics - key components that invite sustained employee interaction.

The team wanted to brand its messaging and ensure emails were consistent, mobile-device-ready, and visually appealing. On its own, Outlook couldn't give them the design flexibility it needed.

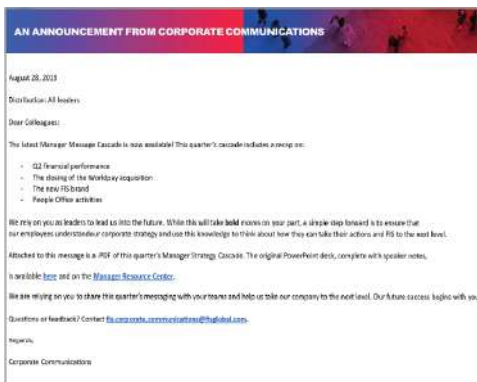
After integrating PoliteMail into Outlook, they could design sleek and consistent email templates—without calling in an HTML or Dreamweaver specialist.



Using the PoliteMail template builder, the team now creates HTML messages that are visually appealing, well-organized, mobile-responsive, and adhere to their brand guidelines.

They can now easily A/B test their campaigns, measure the results, and continuously improve their designs.

Before



After



Data analysis showed that emails were too long and not engaging for employees. They improved readership rates by reducing the amount of text and developing consistent and eye-catching layouts.

Right Message, Wrong Time Zone

At the outset of the pandemic, their HR and communications departments were tasked with onboarding 80,000 employees to a fully-remote work model.

Team members expected a steady cadence of updates and resources. The trouble was these messages were hitting email boxes at the wrong time.

The company is based in the U.S., but its clients and team members are spread across 50+ countries and numerous time zones. Before integrating PoliteMail, emails might have arrived in the morning for a domestic team member but late in the evening for an international employee.

This might seem like a small inconvenience, but PoliteMail's analysis shows that time matters. Most email opens occur between 10 a.m. and 12 p.m. or 5 p.m. and 6 p.m. in that recipient's time zone.

To maximize impact, flexibility was needed to create segmented lists by time zone and send messages at the appropriate time. PoliteMail made it happen.

Now departments can schedule launch dates and times so employees receive messages at the intended time, regardless of where they live.



Sometimes Less Is More

When the pandemic hit, the HR and communications departments clicked into overdrive. Employees craved engagement and resources, yet engagement levels remained low.

Why weren't employees clicking, reading, and responding?

After analyzing PoliteMail analytics, leadership realized they were unintentionally overloading inboxes. So they recalibrated their strategy and reduced the number of outgoing emails from two every day to a single message that hit inboxes on schedule, regardless of time zone.

The result? Open, click, and reading times soared!



"The PoliteMail software completely changed everything. Having metrics is the biggest thing, but it also changed the look and feel of our communications. That ups our game and makes people want to engage."

Senior Director of Corporate Communications



Using PoliteMail, leadership was able to:

- Integrate data-driven software inside their preferred communications platform – without compromising security
- Maintain General Data Protection Regulations (GDPR) compliance
- Eliminate inconsistencies with distribution lists
- Reduce manual tasks by using built-in automation tools
- Measure reading time, open and click rates, and the overall impact of internal messaging
- Improve email presentation and increase employee engagement
- Ensure a global workforce of 80,000 receives messages at the optimal time, despite unique timezones