



## CHALLENGE

Sprint sends hundreds of emails and direct mail pieces to millions of customers and prospects each year. Preparing content for all those emails and mailings was manual and time-intensive. Sprint requested recommendations for streamlining the process.

## SOLUTION

I proposed creating a web application to automate and standardize the operations required to create the emails and direct mail pieces, improving quality, ensuring accuracy, and saving time and money.

## MY ROLE

- ▶ Project lead
- ▶ Business analysis
- ▶ System architecture
- ▶ Translated business needs into development requirements
- ▶ UX/UI design
- ▶ Technical development oversight
- ▶ Documentation and user training/support



## APPROACH / FEATURES

- ▶ Assembling the elements for an email or direct mails piece (copy, images, legal disclaimers, email subject lines, snippet copy, links and tracking tags) is done via a step-by-step wizard.
- ▶ Depending on their roles, users manage different steps (e.g., a graphic artist adds images, a writer adds copy, etc.).
- ▶ Built-in workflow moves tasks from one contributor to the next.
- ▶ The result of the wizard workflow is the creation of a complete “product record” that contains everything required to produce a specific email or printed direct mail piece.

### STEP-BY-STEP WIZARD

1 START FROM SCRATCH OR COPY EXISTING RECORD

2 PROVIDE GENERAL INFORMATION

3 ACCT. MANAGER ADDS BRIEF; WRITER ADDS COPY

4 IMAGES ARE ADDED FROM IMAGE LIBRARY

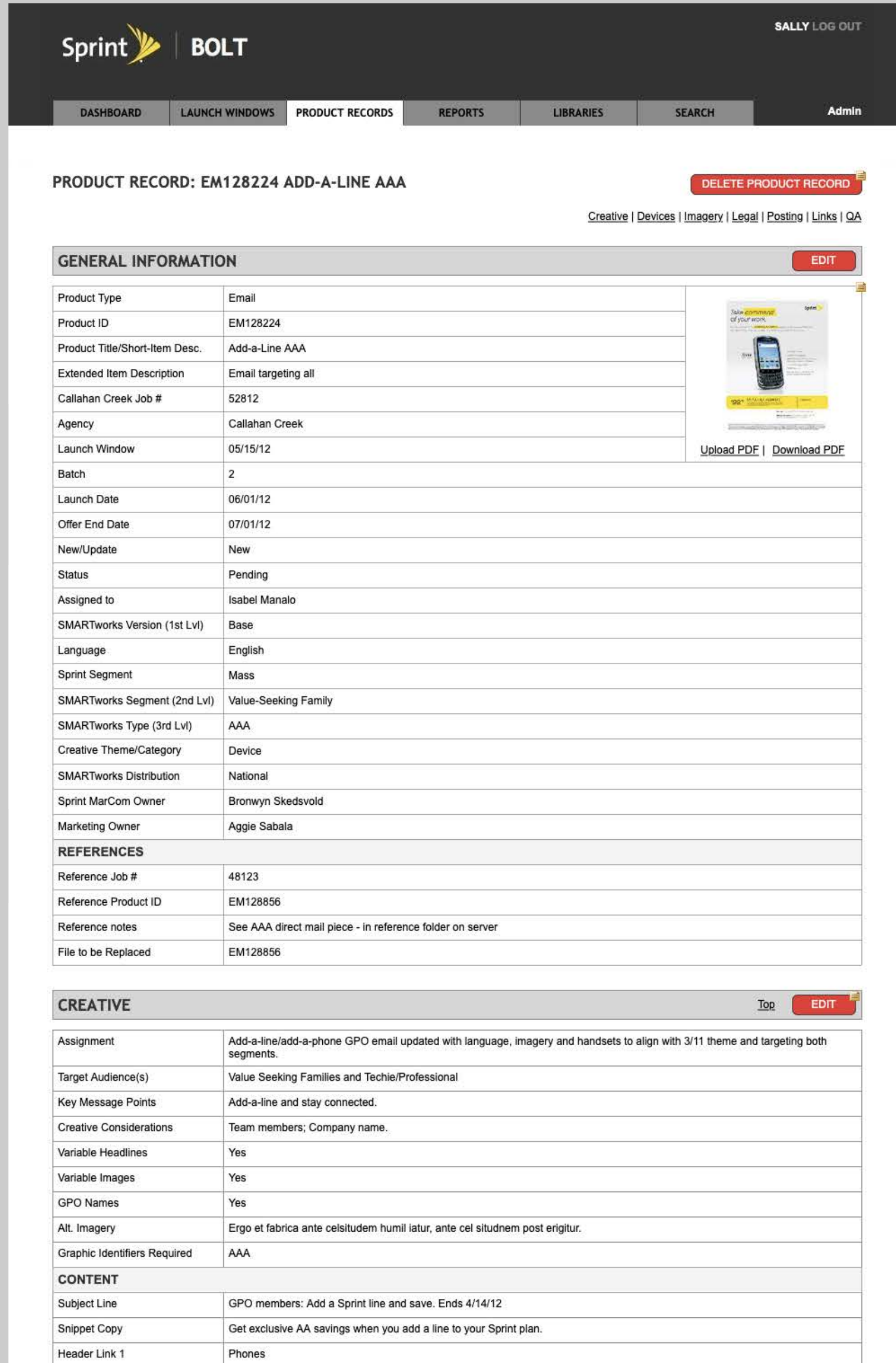
5 LEGAL DISCLAIMERS ARE ADDED FROM LIBRARY

6 LINKS AND TAGS ARE CREATED



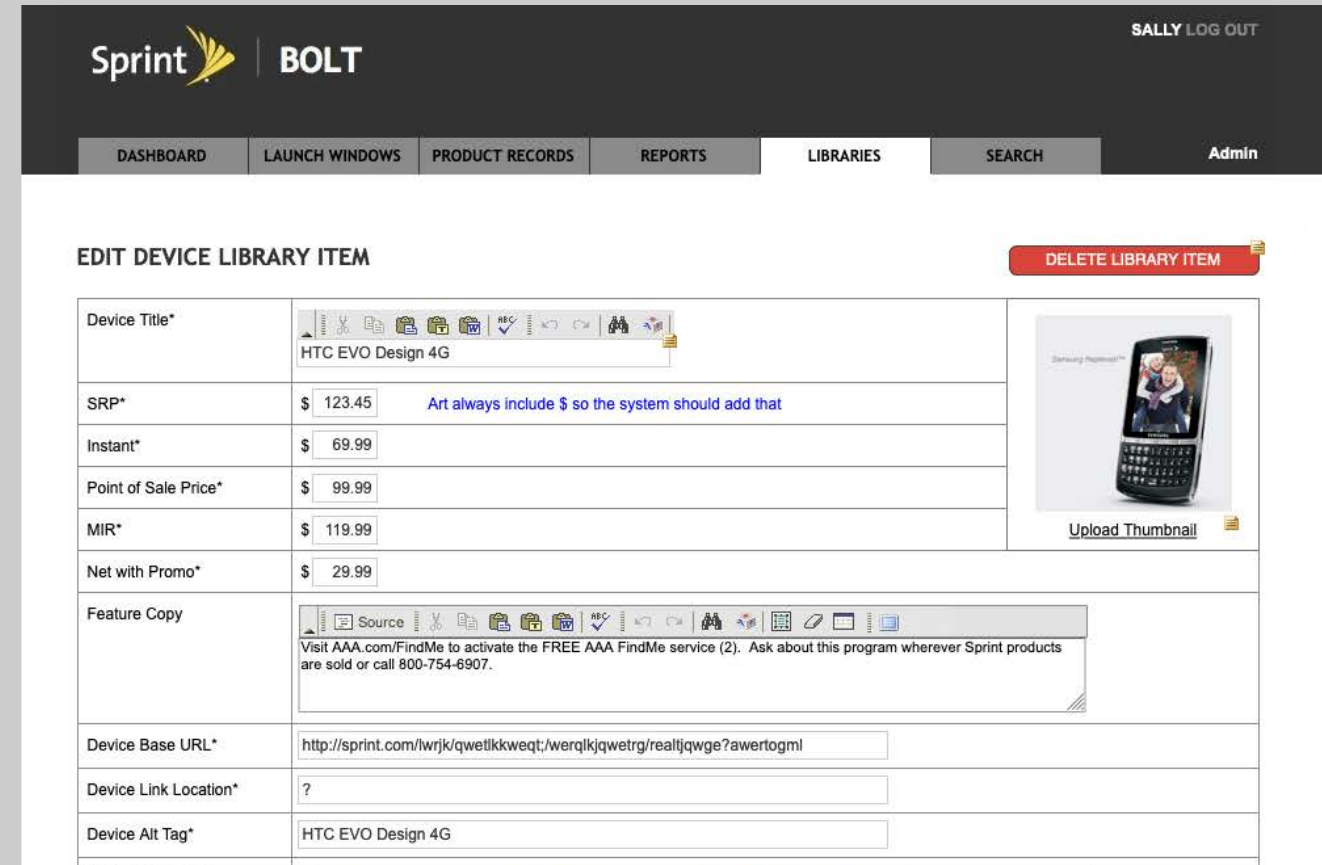


- ▶ Image, disclaimer and tag libraries allow standard elements to be kept up to date and to be efficiently added to each piece via the wizard.
- ▶ Finished products are archived in the app database for reference and reuse. Past records are easily found using a custom advanced search feature.

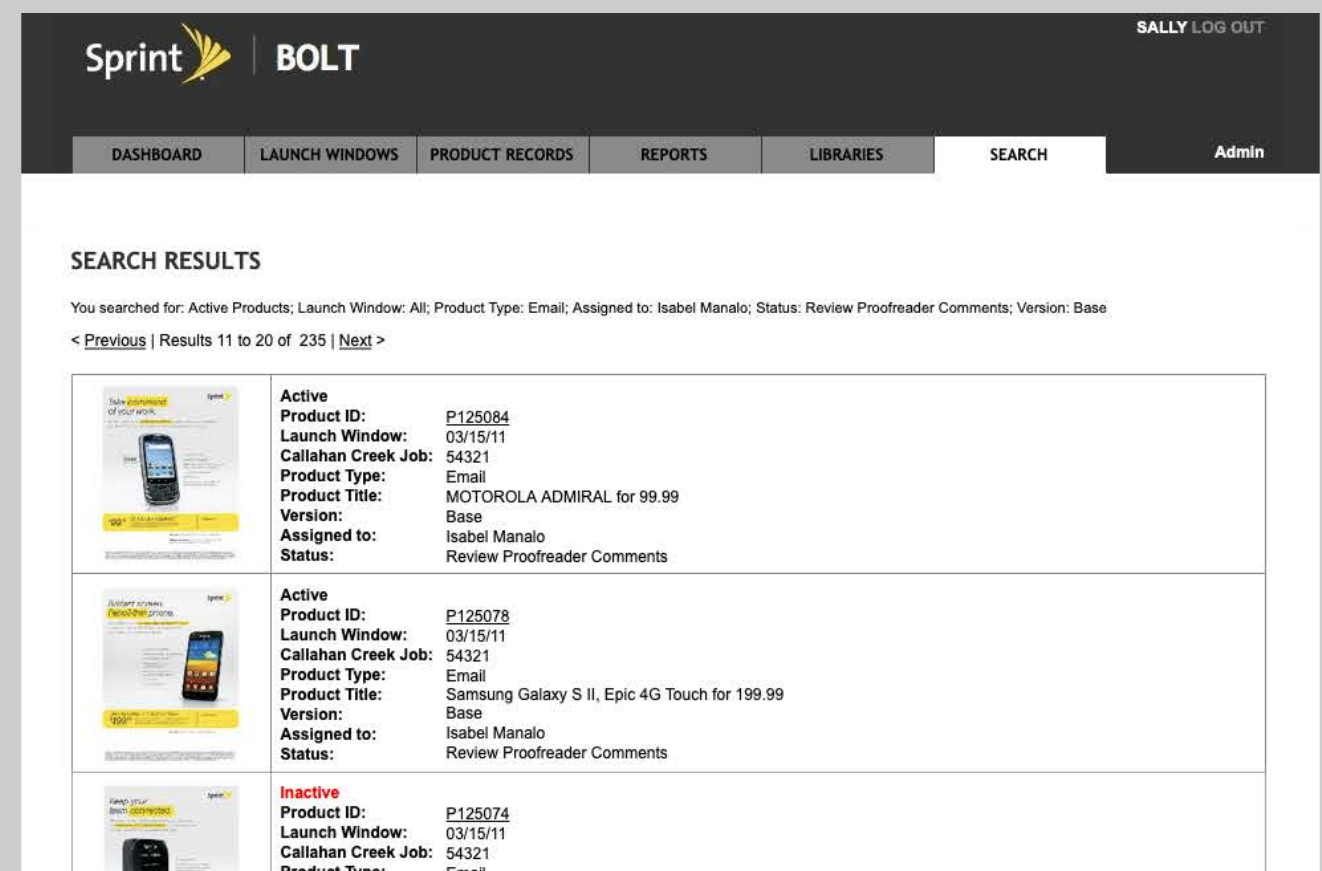


A COMPLETE PRODUCT RECORD

IMAGE LIBRARY



## SEARCH ENGINE TO LOCATE PRODUCT RECORDS







## LINK AND TAG MANGEMENT

- ▶ One of the features of this app that saves the most time and reduces QA issues is the automated creation of URLs with tracking tags for emails.
- ▶ Prior to this app tags were created manually and were often prone to human error.
- ▶ I clarified the complex formula for tag creation and translated it into requirements for the dev team along with all the other specifications.

LINKS

Top EDIT STEP 1 EDIT STEP 2

HTML EMAIL LINKS

Header

Snippet	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Sprint logo	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Phones	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Accessories	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Digital Lounge	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Service Discounts	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Body

CTA button-Learn	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Device 1 image	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - Facebook	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - Twitter	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - YouTube	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Footer

Sprint.com/business	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
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Legal

Unsubscribe	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Privacy Policy	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Sprint.com	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Terms & Conditions	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Mobiltv.com	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

TEXT EMAIL LINKS

Header

Snippet	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
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Body

CTA button-Learn	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Device 1 image	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - Facebook	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - Twitter	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - YouTube	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Footer

Sprint.com/business	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
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Legal

Unsubscribe	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Privacy Policy	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Sprint.com	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Terms & Conditions	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Mobiltv.com	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

DEVICE LINKS

Device 1 - <<Device Title>>

EDIT

Device	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
CTA	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Device 2 - <<Device Title>>

EDIT

Device	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
CTA	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Device 3 - <<Device Title>>

EDIT

Device	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
CTA	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

QA

Top EDIT

## URLS GENERATED BY THE APP

URL Builder (Email Product only)

At any point in the workflow, a Digital Producer or Account Manager can prepare the Links needed for email products. To start, they locate the product on their dashboard (or via search) and click the Links Step 1 Edit button on the Complete Product Record page.

LINKS

HTML EMAIL LINKS

Header

Step 1:  
http://digital.callahencreek.com/clients/sprint-biz/52000/prototype6/Product\_Record\_Links\_Step\_1.html

Step 2:  
http://digital.callahencreek.com/clients/sprint-biz/52000/prototype6/Product\_Record\_Links\_Step\_2.html

For each required link specified by checking a box on the Step 1 page, a URL is built by the system and placed in an editable field on the Step 2 page, using the following business rules:

Business rules for Links:

(Base URL)&ECID=MA:EM:(Launch Date);IL:(Product ID);(Link Location)

If Text option is clicked:

(Base URL)&ECID=MA:EM:(Launch Date);IL:(Product ID);(Link Location)

The (Date from the Launch Window Title, converted to YYYYMMDD – e.g. Launch Window 05/10/12 = 20120510) and (Product ID).

For the following Links types, the (Base URL) and (Link Location) elements will be found in the Link Library:

Header	Special Header
Body	Special Body
Footer	Special Footer
Legal	Special Legal

For Devices and Device CTAs, there is one difference for the Link – there is an ampersand immediately following the Base URL instead of a question mark:

(Base URL)&ECID=MA:EM:(Launch Date);IL:(Product ID);(Link Location)

Note: Product IDs that include ".SP" should convert the ".SP" to "\_SP\_" for link building.

Device Links

For Devices, the (Base URL) and (Link Location) elements will be found in the Device Library. The same business rules apply as above. The Device links are not specified on the Links Part 1 page, but rather they automatically generated by the system and appear on the Links Part 2 page based on which devices are specified on the Device page of the Product Record.

Updating Links when Product Records are copied

When Product Records are copied from old Products, the system should automatically update all the links on the Links 2 page using the new Launch Window Date and the new Product ID.

BOLT

Sprint Biz Online Workflow Tool

Callahan Creek, Job #52000

Development specs v1.0

April 9, 2012

Overview

BOLT Biz Online Tool is a web application designed to manage workflow for Callahan Creek's Sprint Biz & web. Our work for this client encompasses management, creation and production of articles for approximately 100 individual marketing elements (emails, postcards, etc) needs the users of each "Launch Window" (which can be thought of as a "campaign") inclusion of all the elements for a given product (product). There is a new Launch Window every 8-9 weeks.

Goals

This objective of the workflow tool is to facilitate and improve the accuracy and efficiency on the work. This will be accomplished by:

- Creating a single online database where all information (information is stored, rather than relying on remembering a number of Excel spreadsheet addresses.
- Automating some processes that are currently done manually.
- Eliminating duplication of effort between Callahan Creek team members.
- Allowing some Production resources to process simultaneously, which are now performed in linear steps.

Definitions

Launch Window

A group of up to 100 individual promotional pieces (brochures, postcards, letters, bill inserts) that are created by Callahan Creek in a set timeframe. Callahan Creek defines elements of time for each piece to Standard Progress. Launch Windows are identified by a Launch Window Title, which is a GMS (MAG/CTY).

Standard Progress

The Sprint Biz Online Tool manages an online catalog of all the promotional pieces (brochures, postcards, letters, bill inserts, etc) and Standard Progress. Each Product type has a unique set of information to be captured in the system.

Product

One Product is one promotional piece. These four specific classifications of Products: Brochures, Letters, Bill Inserts and Postcards. Each Product type has a unique set of information to be captured in the system.

Product Record

A complete Product Record is all the data associated with one Product.

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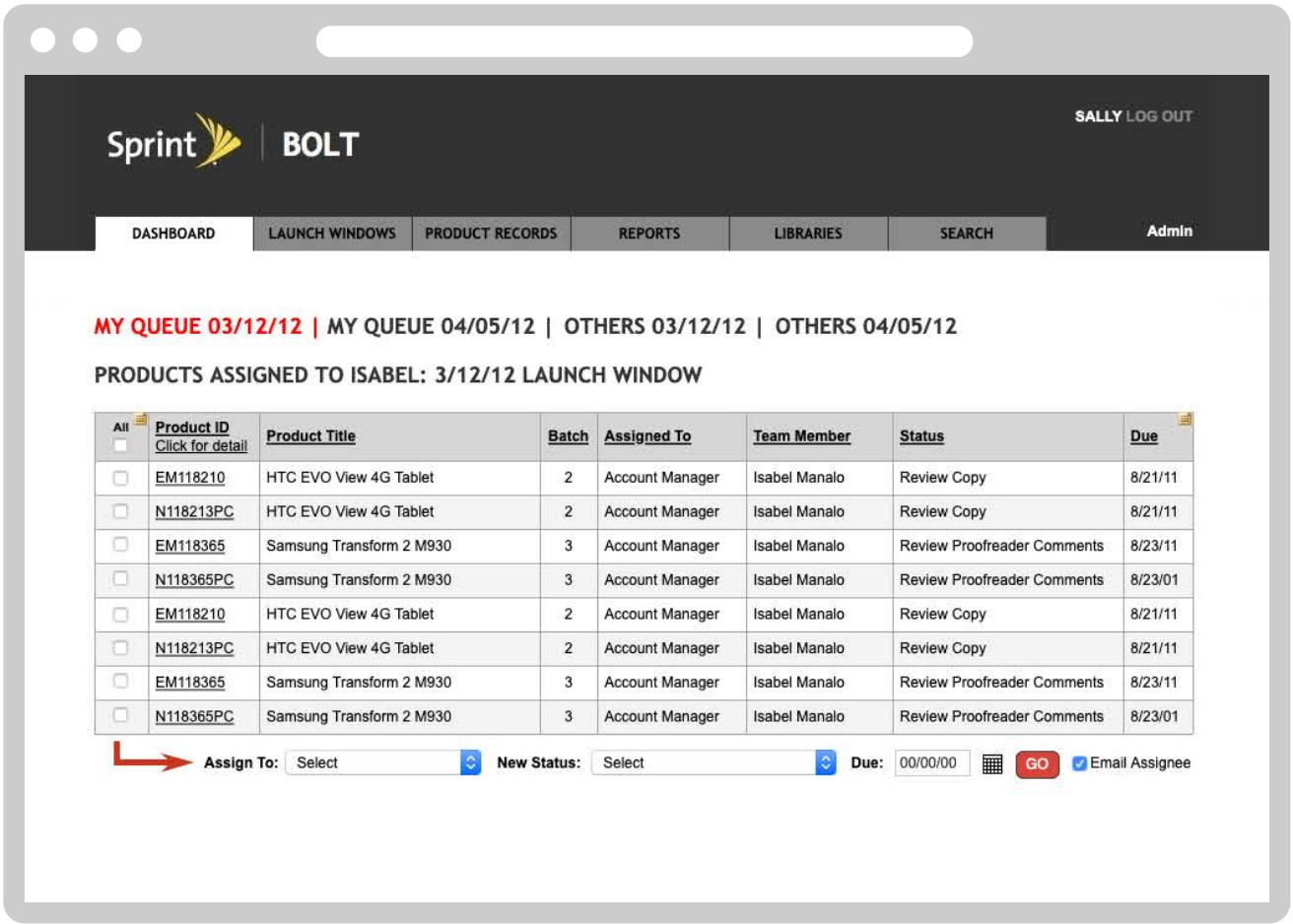




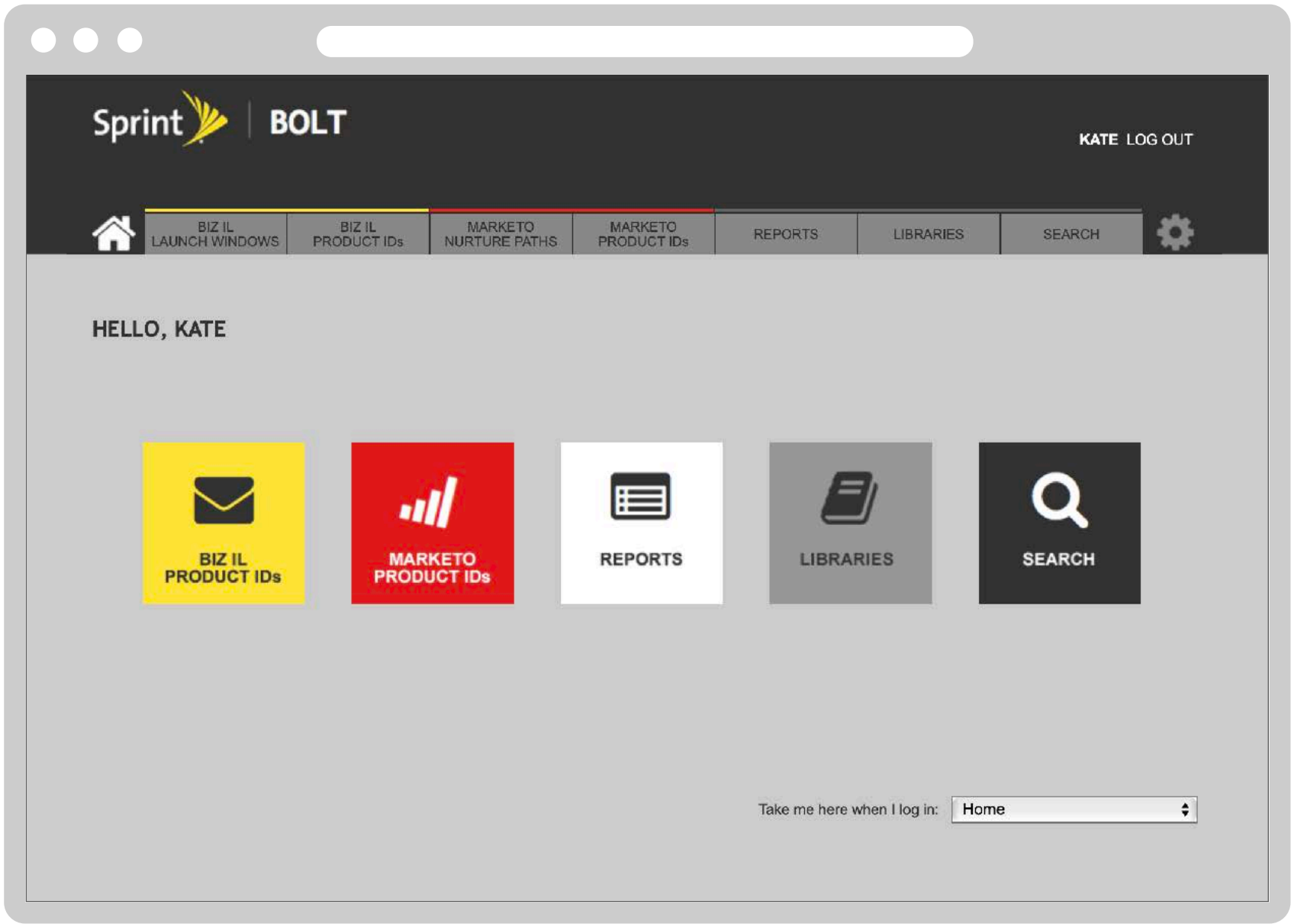
UI UPDATE

- ▶ The addition of Marketo as a Sprint email platform necessitated the expansion of BOLT to create Marketo emails in addition to those created for their other systems.
- ▶ This required a UI and functionality update to modify it to fit the Marketo requirements.

ORIGINAL UI



UPDATED UI



AXURE PROTOTYPE  
OF ORIGINAL UI



AXURE PROTOTYPE  
OF UPDATED UI

