

[CASE STUDY]

Making the Investment in a Content Supply Chain

HOW VANGUARD MARKETING DROVE HIGH RETURNS WITH LEAPPOINT & ADOBE WORKFRONT

Vanguard has been a global leader in investment management and retirement services for over four decades. Their unique investor-owned structure puts their shareholders first—meaning that when someone invests with Vanguard, there is a mutual undertaking to achieve success. Thanks to their unwavering commitment to fairness and excellence, millions have stood – and continue to stand – by the Vanguard mission.

As an organization that puts people first, the ability to deliver personalized, powerful experiences is paramount to the Vanguard marketing team. In early 2022, they turned to LeapPoint and Adobe Workfront to better enable their teams for success.

THE CHALLENGE

An investor's journey is no longer linear. It is a complex web of touchpoints and interactions across a variety of platforms. As a result, the work of the Vanguard marketing team is a complex web, too. Execution requires coordination and collaboration across disparate content teams, creative teams, project managers, marketing operations, and more.

Historically, the Vanguard team leveraged a Waterfall approach to project management and relied on Aprimo—plus several other tools for planning, calendaring, and other tasks—to facilitate their work. Their desire to move to a more Agile approach required their leaders to seek a newer, more flexible solution to help their teams get to market more effectively.

They also wanted a tool that would be less dependent on internally managed infrastructure and offer a lower total cost of ownership to meet overarching goals for modernization.

“Like many large companies, our marketing team leverages several different tools to execute campaigns. However, we were looking for a foundational system that would not only map to our business processes but also serve as a single source of truth. We found that in Adobe Workfront.”

– Joshua Mann, Marketing Technology Leader, Vanguard

THE SOLUTION

Vanguard marketing and technology leadership had four key objectives for this initiative:

- Shift from old ways to new ways of working without major disruption
- Ensure the tool they selected would support their overall business processes (not the other way around)
- Enable closed-loop campaign reporting from one centralized place to reduce the burden on the marketing team
- Find a tool that would see better engagement and usage across the marketing team

After assessing several options, the Vanguard team selected Adobe Workfront. A key decision point was the fact that they were already using Adobe Creative Cloud and Adobe Experience Manager and felt that a fully connected, cloud-based ecosystem would best meet their long-term needs.

To ensure successful implementation on a tight timeline, Vanguard sought out the expertise of a proven Adobe partner: LeapPoint.

LeapPoint began the implementation in early 2022—and like with any successful engagement, started with discovery and assessment. The plan was to roll Workfront out in a phased approach to four different teams and more than 1,700 users. Each team had distinct requirements and processes, and it was vital that LeapPoint had a detailed understanding of how the marketing organization worked cross-functionally to ensure a best-fit Workfront architecture. LeapPoint looked holistically at Vanguard's processes, along with its existing marketing technology stack, and developed a comprehensive roadmap for success.

From there, the LeapPoint team got to work designing, testing, and ultimately deploying Workfront. The first go-live took place in October, only six short months

after LeapPoint's introduction. Since then, three more teams have gone live.

In addition to implementing Workfront, LeapPoint used Adobe Fusion to integrate Workfront with Adobe Experience Manager Assets. Doing so allows the Vanguard marketing team to review, publish, and store assets in a more streamlined manner—and get content to market faster while still meeting requirements for regulatory compliance.

LeapPoint also offered advice, best practices, and guidance for training and change management. Since most of the Vanguard marketing team weren't existing Workfront practitioners, leadership set up training boot camps and a detailed training curriculum leveraging Adobe Experience League with advice from LeapPoint. While the training was delivered internally, the knowledge and expertise of the LeapPoint team was invaluable in getting the Vanguard teams up to speed.

WORKFRONT IMPLEMENTATION AT-A-GLANCE

4 Internal Teams

(across B2C, B2B, and B2B to C)

1,700 Users

(and growing)

800+ Templates

100+ Custom Forms

30 Request Queues

6 months

to initial deployment

1

operational system of record

THE BENEFITS

One of the asks from Vanguard leadership was to establish a baseline for how quickly campaigns are brought to market—and then make improvements because of the efficiencies delivered by Workfront. The Vanguard marketing team executes between 800 to 1,000 projects in any given month, so even incremental improvements can have a dramatic impact. The baseline is currently being established and a target will be set in the coming fiscal year.

In general, the feedback from the overall marketing team about moving to Adobe Workfront has been overwhelmingly positive. Previous complaints about systems being inflexible, having a lack of visibility, and having difficulty with reporting have now been alleviated.

The Vanguard marketing team has also reduced its overall costs by moving to a more flexible platform and eliminating redundant legacy systems. The plan is to continue to evaluate where other efficiencies can be realized across their larger marketing technology stack.

KEY SUCCESS METRICS



25% reduction in time to deliver projects in Workfront



Increased team member satisfaction



2x more integrated solution

WHY LEAPPOINT?

“After 15 years and countless engagements, the approach and expertise that I saw LeapPoint bring to our implementation was unmatched. They truly took the time to capture our requirements up front and to look at our MarTech environment holistically. Despite an aggressive timeline for the Workfront implementation and integration, the LeapPoint team absolutely set us up for success. We’re a year ahead of where we thought we’d be on the roadmap—and we couldn’t have accomplished that with just any partner.”

- Josh Mann, Marketing Technology Leader, Vanguard

The Proof is in Our Partnership

Experience first-hand how Adobe Workfront and LeapPoint can help your organization. Email sales@leappoint.com to learn more.