

## Creating A Roadmap for Strategic Business Growth

Cass Information Systems is the leader in B2B payment services, providing best-in-class financial software and payment outsourcing. Its Fortune 500 clients include category giants in transportation, telecom, waste management, and other industries.

In 2017, Cass had strong momentum and was eager to begin serving a new, mid-tier market. But expansion proved difficult to achieve. Busy department heads had little available time or budget for the venture, which required an entirely new service model, as well as pricing and marketing strategies. Management tagged Arke to help organize and structure the promising expansion initiative.

Arke's Marketing Technology Alignment (MTA) provided an ideal jumpstart. The strategic process led stakeholders through focused discussions about four key elements — people, processes, technology, and data.

Arke analyzed workshop findings and then researched every aspect of the proposed expansion and formulated go-to-market recommendations. The end result: a specific 24-month action plan with milestones for moving ahead.

## GOALS

- **Create a structured plan for business expansion**
- **Assess the competitive landscape**
- **Prioritize objectives and action steps**
- **Delineate marketing needs and priorities**
- **Define target personas and customer journeys**
- **Identify needed resources and new hires**
- **Activate stakeholders company-wide**
- **Pinpoint technology silos and training roadblocks**



### INDUSTRY

Financial Software

### SERVICES

Arke Marketing Technology Alignment (MTA)

### STRATEGY

Activate internal teams with an objective consulting perspective

*Cass Information Systems, Inc. is a leading provider of integrated information and payment management solutions. Cass enables enterprises to achieve visibility, control, and efficiency in their supply chains, communications networks, facilities and other operations.*

*Disbursing nearly \$50 billion annually on behalf of its clients, and with total assets of \$1.6 billion, Cass is uniquely supported by Cass Commercial Bank. Founded in 1906, and a wholly owned subsidiary, Cass Bank provides sophisticated financial exchange services to the parent organization and its clients.*

# CHALLENGES

Before Cass began working with Arke, the company faced multiple barriers. It needed marketing support and better access to customer data trapped in departmental systems.

Multiple technology platforms were not shared throughout the organization. Lead generation and customer relationship management (CRM) systems were not integrated.

There was no central data repository for prospect and customer contact. Their custom, white-glove service model had evolved around client needs and could not be profitably scaled.

To serve an expanded client base efficiently, homegrown internal processes needed refinement.

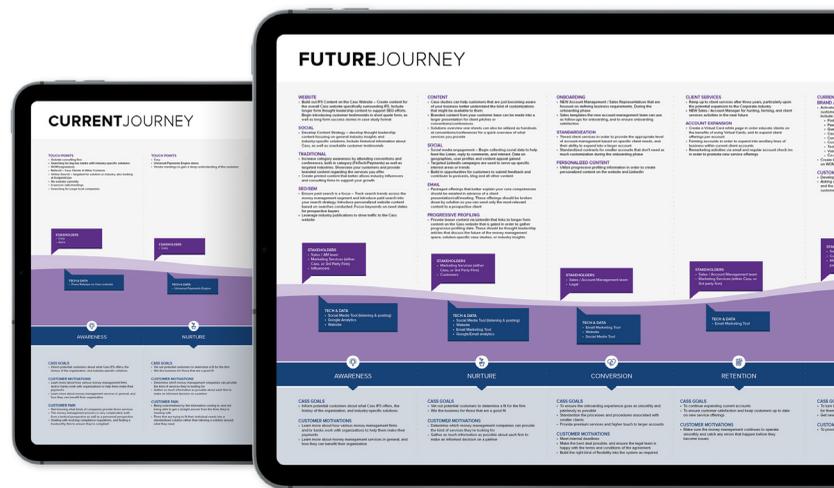
# SOLUTION

Arke's MTA compressed months of work into a shortened timeframe. A team of Arke analysts and strategists assessed Cass's competitive landscape, compiled data, interviewed employees about processes, estimated hours, defined needed enhancements to the technology stack, and formulated a defined plan for moving forward.

The project culminated in a strategic, actionable roadmap that included staffing, technology, and process recommendations. Arke suggested priorities, balancing revenue-impacting actions with necessary but lower-impact tasks.

# TECHNOLOGY

Findings of the Arke MTA revealed numerous ways integration of the Cass marketing stack would improve operations. Recommendations included eliminating redundant systems, sharing platforms across the company, and creating a centralized data warehouse to serve all stakeholders.



*“Arke’s MTA approach made total sense for our business. I saw Arke do this exercise with our freight division and was impressed with how different it felt when they did the same exercise with us. It feels tailor-made for each business.”*

*I was thrilled that the strategy and roadmaps that came out of this process will drive my planning and vision for the next five years.”*

## CORY BRICKER

Vice President of Corporate Development,  
Cass Information Systems

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Once implemented, Arke's recommended solutions will enable:

- **More informed decisions with custom reporting**
- **Core attribute identification. Prospects most likely to convert can be targeted**
- **A data-driven marketing plan that can grow with the new client base**
- **Analytics-based digital strategy, content, and lead generation programs**
- **Lower technology expense, with less system redundancy**
- **Insights that enhance customer experience**
- **More efficient onboarding procedures and automation of other internal processes**



## **RESULTS AND FUTURE GROWTH**

The personas and journey maps Arke produced reveal opportunities to refine existing workflows and meet customer needs more completely.

Cass now uses these foundational assets to inform marketing for its five divisions.

The engagement also resulted in a Leadership practice that lays the groundwork for a future Digital Resource Center, solidifying Cass as the technology innovator leader in financial services.

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