

# Project Portfolio (Use Cases)

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## Business Pillar:

Content marketing, lead generation, and customer lifecycle management.

## Goal:

Work directly with marketing VP to develop a series of omnichannel campaigns from scratch (client did not have any digital marketing programs prior).

# Project Scope Timeline/Stage Recommendations

**\*\*Based off the 5/5 call: [Client] confirmed they do not have journey maps, which will first need to get created prior to Nurture Campaign design.**

**\*\*Once the journey maps are completed and the content strategy outlined, the Nurture Campaign can be designed, approved by stakeholders, and then executed by the MarTech team.**

<b>Project Start</b> <i>[INSERT DATE]</i>	<b>Stage 1 (Crawl)</b> <i>[+2 MONTHS]</i>	<b>Stage 2 (Walk)</b> <i>[+2 MONTHS]</i>	<b>Stage 3 (Run)</b> <i>[+2 MONTHS]</i>
<p align="center"><b>Building the Foundation</b></p>	<p align="center"><b>Analytics + Optimizing the Programs</b></p>	<p align="center"><b>Scaling and Accelerating</b></p>	
<p><b>*Discovery and Journey Mapping:</b></p> <ul style="list-style-type: none"> <li>Meeting with key stakeholders; identifying customer and partner workflows and building journey maps.</li> <li>Prioritizing critical nurture activities: validating technical feasibility in Marketo and validating timelines.</li> </ul> <p><b>Assess the MarTech Environment:</b></p> <ul style="list-style-type: none"> <li>Analyzing existing content library (copy)</li> <li>Analyzing existing MarTech templates (HTML emails/landing pages)</li> </ul> <p><b>Content Strategy:</b></p> <ul style="list-style-type: none"> <li>Stakeholder interviews and content creation plan</li> <li>Write copy for emails and landing pages for Nurture #1 (either net-new or refreshed copy specific to WP business unit).</li> </ul> <p><b>**Nurture Design and Stakeholder Alignment:</b></p> <ul style="list-style-type: none"> <li>Design Nurture #1 for Marketo (using partner/customer journey maps)</li> <li>Get stakeholder approval for nurture design (to include all customer touchpoints and engagement measures)</li> <li>Provide nurture designs to MarTech Execution Team</li> </ul> <p><b>Nurture #1 (Adopt) Build (by MarTech Execution Team)</b></p> <p><b>QA Nurture #1 Campaign and Launch</b></p>	<p><b>Analysis of Launched Nurture #1</b></p> <ul style="list-style-type: none"> <li>Design reports and dashboards to capture campaign performance and MQL behaviors/increasing lead quality (MarTech/CRM team to execute/build)</li> <li>Optimization strategy for nurtures (based off performance)</li> </ul> <p><b>Increasing Partner Channel Usage:</b></p> <ul style="list-style-type: none"> <li>Sharing reports and dashboards to Partners to incentivize list-sharing</li> </ul> <p><b>Analysis of Performance from Nurture #1 applied to build for Nurture #2 (Expand)</b></p> <p><b>Content Strategy:</b></p> <ul style="list-style-type: none"> <li>Stakeholder interviews and content creation plan</li> <li>Write copy for emails and landing pages for Nurture #2 (either net-new or refreshed copy specific to WP business unit).</li> </ul> <p><b>Nurture Design and Stakeholder Alignment:</b></p> <ul style="list-style-type: none"> <li>Design Nurture #2 for Marketo (using partner/customer journey maps)</li> <li>Get stakeholder approval for nurture design (to include all customer touchpoints and engagement measures)</li> <li>Provide nurture designs to MarTech Execution Team</li> </ul> <p><b>Nurture #2 Build (by MarTech Execution Team)</b></p> <p><b>QA Nurture #2 Campaign and Launch</b></p>	<p><b>Analysis of Launched Nurtures #1 and #2 (Adopt and Expand)</b></p> <ul style="list-style-type: none"> <li>Design expanded reports and dashboards to capture campaign performance and MQL behaviors/increasing lead quality (MarTech/CRM team to execute/build)</li> <li>Optimization strategy for nurtures (based off performance)</li> </ul> <p><b>Increasing Partner Channel Usage:</b></p> <ul style="list-style-type: none"> <li>Sharing reports and dashboards to Partners to incentivize list-sharing</li> </ul> <p><b>Scaling/Accelerating Marketing Programs:</b></p> <ul style="list-style-type: none"> <li>Best practice material (documents and videos) for WP and MarTech team for creating new nurtures (for different audiences, use cases, or different stages of the customer lifecycle)</li> <li>Training material for WP's partners to use the new nurtures for their customer, and to read the reports/dashboards around their performance (TBD: if it can be tied to revenue/oppys in CRM).</li> <li>Documented email and landing page templates for WP to scale future nurture builds.</li> </ul> <p><b>Best Practices:</b></p> <ul style="list-style-type: none"> <li>Recommendations for the next evolution of marketing nurtures/campaigns.</li> <li>Recommended roadmap for platform capabilities (to support evolving, more intelligent campaigns).</li> </ul>	

# Asset Overview

**Subject Line:** Why trust Chase for your payment processing?  
**Preheader Text:** Exclusive AAHOA pricing and seamless security, backed by the World's Best Bank®



Simple and secure. Proven and Trusted.



10,000 AAHOA members use our payment processing solutions because they know how many hours you work, and how many calls they never miss a payment.

Let's schedule a complimentary consultation to talk about how we can help you grow your business.

[Click for a 15-minute call](#)

Chase is AAHOA's preferred partner for simple, secure, and trustworthy payment processing solutions.



**PMS or Scheduling Terminal?** As an AAHOA member, you are eligible for our unique pricing.

**True Support** Our dedicated lodging team is here to help you with any issues.

**Why Chase?** Accountability and transparency are at the heart of our business. Chase is committed to the advantage of the latest technology solutions.



**Contact the Chase Lodging Team Today**

Call 800.727.1872 or email [lodging\\_team@chase.com](mailto:lodging_team@chase.com) (available 7:30am - 6:30pm CST)

[Let's Talk](#)

Chase, an AAHOA preferred partner in all things business banking.



**Email 1**  
Deploy Date: 11/1

**Subject Line:** When it comes to fraud, let us help protect your business.  
**Preheader Text:** See why AAHOA members trust Chase with their payment processing.



Get a Payments Leader On Your Side



We know protecting your business is an important goal, so we're focused on keeping you safe.

Learn about Chase's fraud protection services

[Read the Article](#)

"I value my relationship with Chase, that has helped me process transactions faster, resulting in quicker payments, and their cybersecurity measures ensure more trust and security for everyone."

— Heidi Park, Capital City Hospitality Group (Chase Payment Solutions™ Customer and AAHOA member)

We focus on payments — so you can focus on running your business.

- #1 payments processor in the U.S.\*
- -3,000 cybersecurity professionals
- \$700 million invested annually in cybersecurity to keep your payments safe
- 2,892 transactions per second to keep your business moving fast



**Technology + People**

At Chase, we're dedicated to the integration of advanced technology and expert support to protect your business.

We utilize our machine learning and artificial intelligence solutions to recognize and react to suspicious activity in seconds. But we know that technology and automation can't replace the human touch. Our team of experts is always on hand to help you with any issues.

**Why Chase is Better**

1. Safe: Comprehensive fraud and identity protection services.
2. Simple: Easy to set up and manage.
3. Secure: Protects you, protecting your business.

**Fraud Prevention Services**

Account and Security Alerts: Alerts you to suspicious activity, including authorized or unauthorized activity, account transfers, and more.

Check Monitoring: You're approved merchant, and we'll let you know when any check connections show that activity for you, or from another, or flag!

Check Protection Service: We'll monitor your check transactions, notifying you of suspicious activity and providing you with a replacement check.

ACH Debit Block: Block or restrict ACH transactions to identify which vendors can collect payments or block ACH transactions from your accounts.

Chase, an AAHOA preferred partner in all things business banking and payments.

**Contact Your Dedicated Lodging Team Today**

Call 800.727.1872 or email [lodging\\_team@chase.com](mailto:lodging_team@chase.com) (available 7:30am - 6:30pm CST)

**When it comes to fraud prevention, we keep you one step ahead.**

In an always-on, digitally interconnected world, fraud can come from anywhere. Identity criminals use scams, digital payments, email threads, and even checks to steal from your hotel and disrupt your bottom line. In fact, financial crimes happen more often, and more quickly, than ever before, amounting to an astonishing 3.8k of global GDP.\*

\*Source: Fortis, 2022



**Email 2 + Article**  
Deploy Date: 7 Days after Email 1

**Subject Line:** What Can Our Dedicated Lodging Team Do For You?  
**Preheader Text:** As AAHOA's trusted payments partner for 25 years, we understand hotels and your business.



Our specialized lodging team understands the complexities of credit card processing.



Let us help you uncover potential savings and solutions with our true 1-1 support.

"The Chase team has been there for our needs, they've helped me expand, and more importantly the breadth of products they offer is unmatched by anyone else in the industry."

— Heidi Valde, Phoenix Hospitality (Chase Payment Solutions™ Customer and AAHOA member)

Chase is AAHOA's preferred partner for simple and secure solutions for accepting card payments. Backed by JPMorgan Chase, named World's Best Bank.®

<b>AAHOA Member Pricing</b> As a member of AAHOA, you have access to flexible payment options at exclusive pricing.	<b>Flexible Products</b> PMS or scheduling terminal? Let us help solve the problem you're facing.	<b>Multifaceted, Multilingual.</b> Our team is here to help in English, Hindi, Spanish, and other languages.
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"We are proud of our 25-year partnership with AAHOA. Our real estate and hospitality team is dedicated to solving the challenges of lodging businesses, helping you thrive and prosper."

— Helen Khan, Executive Director, Lodging Team (JPMorgan Chase)

**Contact the Chase Lodging Team today**

Call 800.727.1872 or email [lodging\\_team@chase.com](mailto:lodging_team@chase.com) (available 7:30am - 6:30pm CST)

[Schedule a Call](#)

Chase, an AAHOA preferred partner in all things business banking and payments.



**Email 3**  
Deploy Date: 7 Days after Email 2

PDF Article hosted in Marketo  
Linked to in the email (Primary CTA)