



Rydex Investments Rides High with Unica®

Burgeoning investment firm replaces manual processes for better marketing efficiency and resource management

BACKGROUND

Rydex Investments has provided solutions to investment advisors, institutions and individual investors since 1993. This industry pioneer was the first mutual fund company to offer short and leveraged benchmark-based mutual funds. Today, Rydex manages over \$16 billion in assets via more than 100 mutual funds and exchange traded funds (ETFs).

THE CHALLENGES

In Rydex's early days, the company's marketing planning and execution processes were manual. As the company grew, however, the marketing department's lack of a centralized, team-oriented approach made it difficult to track individual projects and tasks, let alone manage closed-loop campaigns. Project management was a cumbersome process. Support staff, such as the writing and design teams, were frustrated and stressed. The teams also found it difficult to track progress or measure ROI.

Beyond these immediate issues, the company also realized that its long-term success depended on the ability to streamline its marketing processes in support of product development, strategic product positioning, creative work, delivery, performance metrics and ROI. Although Rydex's leaders believed that such efforts would extend into the future, they knew that a marketing resource management (MRM) system would improve the company's ability to plan, coordinate and measure the impact of its marketing efforts.

THE SOLUTION

Rydex turned to Unica Corporation for a tactical planning and workflow management "quick fix." Rydex director of marketing operations and marketing services, Miyeko Keen, recalls, "The system was easy to understand and easy to implement. As such, we purchased the web-based software as a temporary solution until a more complete system could be identified."

Rydex had intended to eventually upgrade to an on-premise, enterprise solution. But after several smart components were added to Unica Marketing Operations OnDemand, including strategic management and budgeting functions, Rydex realized that its existing Unica system could become the complete solution it needed.

USAGE

From a tactical standpoint, Rydex's 35-member marketing team uses Unica Marketing Operations OnDemand to seamlessly collaborate on marketing projects. The system also streamlines the day-to-day execution of key projects, ensuring they are delivered on time.

Strategically, the systems management and budgeting functions provide a solution for effectively managing people and projects, as well as allocating appropriate resources and funds to accomplish specific marketing objectives. It also allows Rydex to change workflow from time to time, which helps the company comply with shifts in regulatory requirements.

OBJECTIVES

- Streamline marketing processes
- Plan, track and manage individual projects and campaigns
- Measure impact of marketing initiatives
- Effectively allocate market resources and budget

RESULTS

- Rydex has run 1,250 projects with multiple deliverables - achieving 25 percent more output with zero increase in staff
- The larger number of projects helped Rydex respond to market demands for information more effectively and quickly
- Unica Marketing Operations OnDemand measures exactly how much time is spent on a particular campaign and determines the expected ROI

THE RESULTS

Rydex estimates that Unica Marketing Operations OnDemand helped the company increase deliverables by 25 percent with the same amount of staff. It takes significantly less time and fewer resources to traffic and manage projects. And the system's easy-to-use collaborative work areas allow for multiple resource management and parallel approval and collaboration.

Equally important, the strategic planning components of the system unite strategy and execution in a common framework. This information helps guide managers towards more accurate staff allocation, with detailed information that brings together consistent investment and return numbers, supports fulfillment of budget requests, and simplifies project tracking. As a result, planning, review and approval cycles have been significantly shortened.

Likewise, the Unica solution facilitates execution of critical individual elements within the overall plan. Starting with workflow automation for campaigns, events and mediums, the system easily supports comprehensive setup, organization and sharing of project-related schedules, tasks and resources.

"I highly recommend Unica Marketing Operations OnDemand to companies seeking an MRM system that is easy to implement, use and maintain. The open layout enables the system to improve marketing efficiencies regardless of the team's processes/procedures. Plus, the system's web-based technology requires few IT resources to implement, so a team can be up and running in less than a couple of weeks."

*Miyeko Keen
Director of Marketing
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