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Company-wide campaign planning with the Swiss Post

The search for a cross-divisional campaign plan

The Swiss Post is the third-largest employer in Switzerland with over 55,900 employees working in various branches, located in each language region of the country as well as abroad. Its main divisions are Post Mail, Post Network and Swiss Post Solution in the communication sector and PostLogistic (logistics), PostBus (passenger transport) and PostFinance (financial services) in the service sector. This is why it was looking for a cross-divisional planning tool that could be used across multiple countries for all internal and external communication campaigns, for both products and services.

The Swiss Post had already been using the censhare Web-to-Publish, the Digital Asset Management, the Marketing Resource Management and the Editorial System since 2010 to produce and manage all its communications. Therefore, it made sense to implement the campaign planning tool together with the aclevion team and the censhare solution. Accordingly,

aclevion's team of experts adapted the censhare system solution to the new communication needs.

The two most important project requirements were the cross-divisional management of high-level planning, divisional planning and all channels plus an up-to-date overview of all campaigns within the annual rolling plan.

The following criteria had to be met:

– A uniform tool for all company divisions

– Simple creation of plans, topics, activities and tasks

– Relational linkage of plans, topics, activities, tasks, people, business units and target groups

– Visualisation in a GANTT chart

– Inheritance of planning information and characteristics

– Relation of assets (e.g. images, layouts, people)

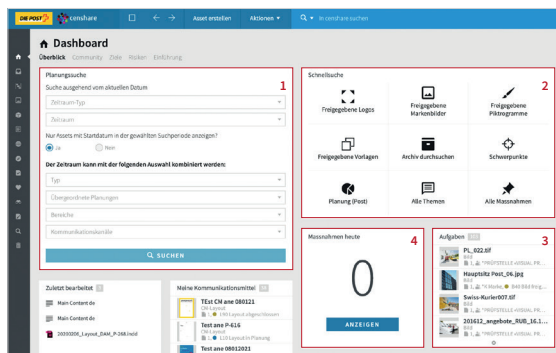– Detail search functions according to criteria as well as individual time periods

> **« With the implementation of topic planning using the censhare solution, we were able to consolidate diverse planning into one system and thus achieve more efficiency and relevance in our communication efforts. »**

Michael Eberle, Product Owner

The following criteria were added during the course of the project:

– Extension of possible links from «Topics to Topics» and «Tasks to Topics»

– Search and function widgets for improved user experience

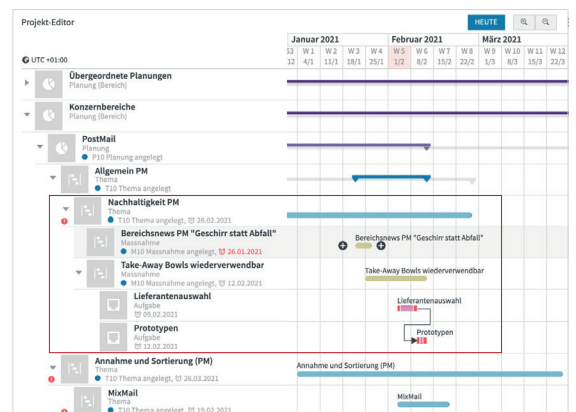– Make confidential content available to a restricted user group

as a DAM. This means that tasks, deadlines and milestones can now be neatly managed for all company-wide campaign planning. In addition, there were already various interfaces to internal and external systems (e.g., Sitecore), which is why it was obvious that the campaign management should also be expanded accordingly with the existing censhare system solution.
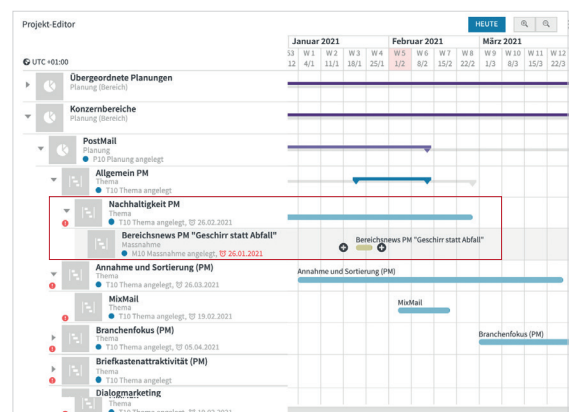

1. Search widget: A search is triggered by entering various options.

2. Quick search widget: Clicking on individual shortcuts triggers a predefined search.

3. Task widget: lists all tasks assigned to the corresponding user.

4. Display widget: A configuration runs a search in the background, displaying the result in the widget.

GANTT chart before completing an activity, incl. tasks.

GANTT chart after completion of an activity. It disappears from the overview. Tasks are also archived.
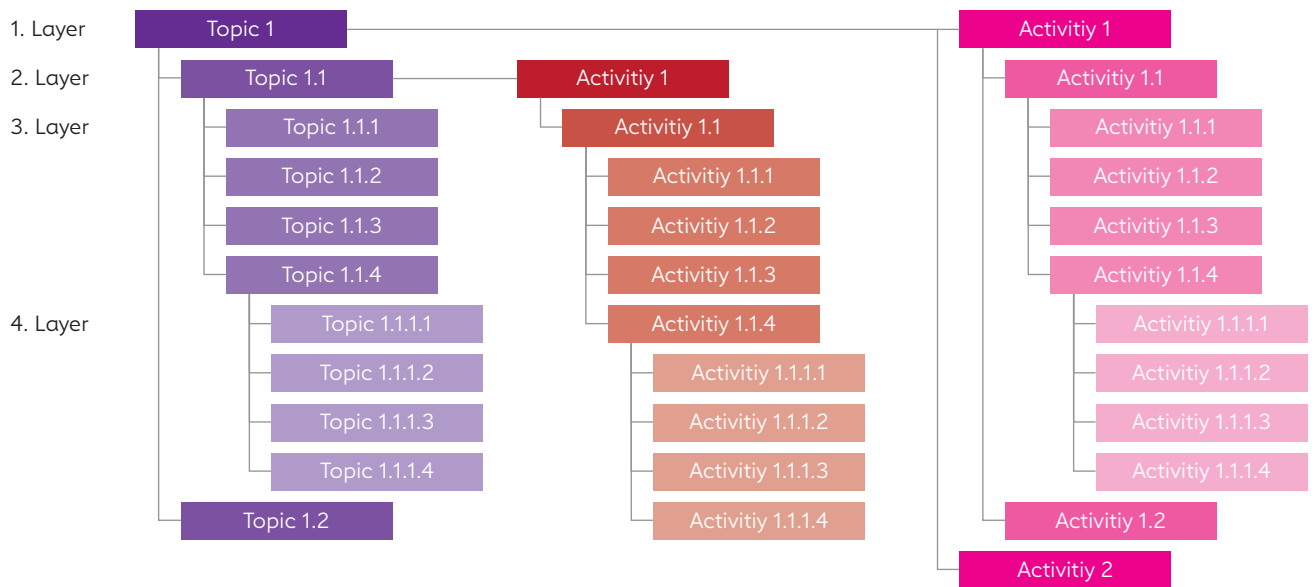
A fitting solution

The Swiss Post decided in favour of the censhare Project Editor based on the specified criteria and the fact that the company has been using censhare since 2010 as an editorial system (e.g. for the employee and private customer magazine), as a Web-to-Publish and

1. Layer	Topic 1				Activitiy 1
2. Layer	Topic 1.1	Activitiy 1		Activitiy 1.1	
3. Layer	Topic 1.1.1	Activitiy 1.1		Activitiy 1.1.1	
	Topic 1.1.2	Activitiy 1.1.1		Activitiy 1.1.2	
	Topic 1.1.3	Activitiy 1.1.2		Activitiy 1.1.3	
	Topic 1.1.4	Activitiy 1.1.3		Activitiy 1.1.4	
4. Layer	Topic 1.1.1.1	Activitiy 1.1.4		Activitiy 1.1.1.1	
	Topic 1.1.1.2	Activitiy 1.1.1.1		Activitiy 1.1.1.2	
	Topic 1.1.1.3	Activitiy 1.1.1.2		Activitiy 1.1.1.3	
	Topic 1.1.1.4	Activitiy 1.1.1.3		Activitiy 1.1.1.4	
	Topic 1.2	Activitiy 1.1.1.4		Activitiy 1.2	
				Activitiy 2	

Link depth with subtopics and activities.

Setup of the censhare Project Editor

Swiss Post created a fixed planning structure with three planning areas, seven business areas and eleven functional areas, as well as an open planning area. Within this structure, campaigns can be created and planned using predefined templates. In the open planning area, it is also possible to carry out additional planning with related topics.

To keep everything clear and simple and ensure good system performance, the decision was made to have a maximum link depth of four levels. This means that four topics can be linked to each other hierarchically. And topics, activities and tasks can be linked to these topics.

The continual updating and visualisation of the GANTT charts is also a key factor in campaign planning. For this reason, various workflow processes with predefined automatisms were stored for the planning, topics and activities. As a practical example, an activity will be archived and disapears automatically from the project editor two weeks after its planned completion date. At the same time, the tasks linked to this activity or sub-tasks are also automatically archived. It is not manda-tory that these were completed. All topics are moved to an archive domain as soon as all associated subtopics and activities, etc. have been archived. This means that the GANTT chart always remains up-to-date and clear.

Efficient Campaign Search

Cross-divisional campaign plans generate a large amount of available data. Efficient search mechanisms must be available so that one can search for data quickly. The aclevion team set up a specific search widget for the Swiss Post in addition to the individual standard search mechanisms from censhare. This made it possible to conduct a time-based search.

Based on the planning period of a campaign (freely selectable period, calendar week or days), the user can search for topics, activities and tasks as well as high-ranking plans, business or functional areas and communication channels of a campaign (taking into account the start date of the campaign).

Successful implementation

The agile working method according to Scrum meth-odology was certainly one of the success factors in the implementation of the interdisciplinary campaign plan. The project team, consisting of Swiss Post, aclevion and agency members, coordinated the progress of the project through daily online meetings, weekly refine-ments and bi-weekly review, retrospective and strategy
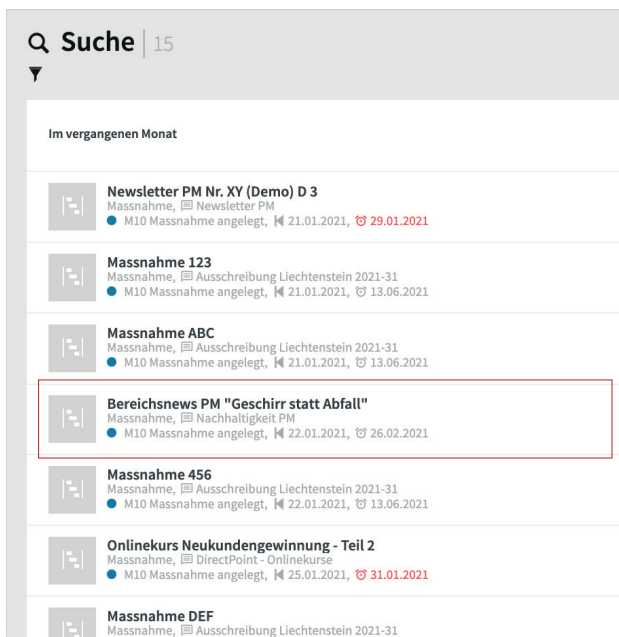
meetings. The stakeholders were also involved in the review meetings so that they could follow the progress of the project and have a direct influence on any modifications.

The Scrum approach kept the number of project resources low, and the client was heavily involved in the development from the beginning, in the role of Scrum Master and Product Owner. The client was responsible for prioritising upcoming project requirements and clarifying any questions from the stakeholders.

The search results can be sorted by the start date of a campaign.

Conclusion

We were able to successfully implement the requirements of an all-in-one tool for campaign planning and go live on time. The agile working method and dedicated resources for the specification, development and test management improved the collaboration, shortened the lines of communication and made it possible for everyone involved to participate and contribute to the entire process right from the start. This reduced errors and led to an efficient workflow. The client is very satisfied with the product and is continually expanding the system's capabilities. The customer feedback was extremely positive and enthusiastic right from the start:

– Scrum Master Post: «Constructive and solution-oriented collaboration → Keep it up!»

– Product Owner Post: «Goal-oriented, professional and efficient collaboration!»

– User: «The system supports easy and intuitive work!»

About aclevion

We see ourselves as experts when it comes to implementing and supporting clever software system solutions, for optimal communication content management and its multi-channel use, in your company. The aclevion team has many years of comprehensive experience in consulting and supporting well-known national and international companies from a wide range of industries.

These include, for example, Alnatura, BLS, Chocolat Halba, Geberit, Globus, ESA, Leister Technologie, Manor, Migros, Office World, Sanitas Insurance, SwissRe, Swiss Post and many more.

Further information at **aclevion.com**