BrightDesk

One Clean Customer Record

Reverse Pitch Proposal

PREPARED FOR	PREPARED BY	CONTACT	DATE
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1. Executive Summary

Massey's marketing team spends hours combining and cleaning lists before campaigns. Corrections made for one campaign have to be repeated when new exports arrive.

We propose a tool that helps marketing prepare the right audience, explain every decision and make approved corrections stick. Massey’s marketing team would choose a campaign, review exceptions and approve the finished list. Reviewed corrections would also go back to the CRM through a method confirmed with IT.

Linked customer records would support this workflow while keeping people, households, properties and service accounts distinct. The build can be assessed alongside the current CRM; its replacement is a separate decision.

Why BrightDesk

- **Milestone-based delivery.** Our delivery milestones will provide clear acceptance points and opportunities to continue or exit.
- **User-centered design.** User experience design is a key differentiator for BrightDesk. We will design the tool so your team can understand what changed, assess their options, and decide what to do next.
- **AI-driven development.** We will use AI-driven development to support prototyping and iteration. Any deployed AI and use of customer data must meet Massey’s IT and governance requirements.
- **Tested with your campaigns.** Our team will compare direct-mail and email results with your current process, checking who should be included, who should be left out and why.
- **Proven process reliability.** Your team will initially review recommendations. We will introduce automation only after observed use demonstrates that the underlying process is reliable.
- **Enterprise experience.** Our team brings experience across a variety of organizations, including work supporting an organization with more than 4,000 employees nationwide.

2. Business Context & Opportunity

Massey's direct-mail process uses nine Excel files and nineteen steps. Email lists are prepared internally. New exports arrive every Sunday, but the systems do not carry corrections back.

- Different service accounts can belong to the same customer. Account numbers alone do not catch duplicate mailings or existing services.

- Do-not-contact and deceased notes can sit in name fields while contact restriction boxes are unchecked.
- Property details, outdated information and purchases already in progress can lead to unsuitable offers.
- Incorrect exclusions can remove eligible customers. List problems delay campaigns and take marketing away from planning them.

3. Guiding Principles

Respect the customer

We will keep contact restrictions tied to the right person and channel. Unclear cases will go to review, and our checks will include eligible customers removed by mistake.

Show the reason

We will preserve original records and explain each match, change and exclusion. Reviewers will be able to question a result and undo a mistaken link.

Fix it once

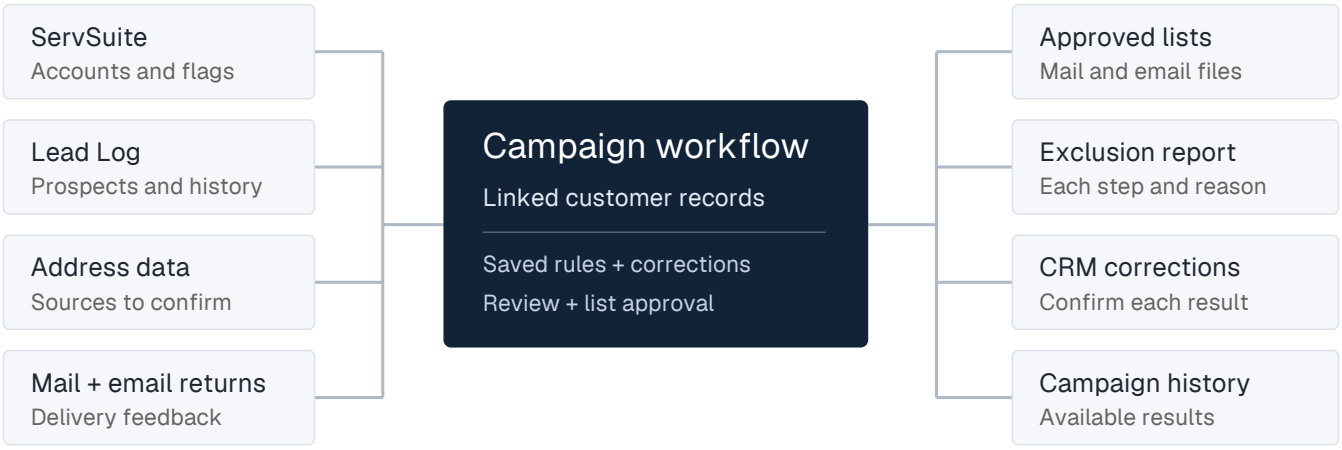
We will preserve approved corrections across new exports. The tool would track which changes reach the CRM and flag failures or conflicts with new information.

4. Discovery

Our team will review the campaign steps with marketing, including the exceptions experienced staff know. We will work with IT to confirm the sources, fields and ways to return corrections.

- We will review CRM and Lead Log exports, saved reports, mail-house instructions and returned files.
- We will compare completed mail and email campaigns, known errors and manual corrections.
- We will check available estimates, pending purchases, active offers and campaign responses.
- We will measure current cleanup effort and list errors, then agree the rules and checks with Massey.

5. Experience & Solution Design



Our team will design the tool to link related records while keeping original IDs and contact restrictions tied to the correct person. Matching would use full addresses, including city, postcode and unit, plus supporting details.

- Marketing would choose a campaign, and the tool would apply its service, property, contact and mailing-frequency rules.
- The tool would check existing services and reliable data on pending purchases or competing offers.
- Reviewers would examine uncertain records and inspect exclusions before approving the audience.
- Before export, the tool would recheck available contact and eligibility data and produce the agreed mail or email format.

The waterfall report would show where records were removed and why. It would keep all applicable reasons, but count each removal once so the totals add up.

6. Prototype & Pilot

Our team will run one completed direct-mail campaign and one email campaign through the proposed workflow. We will compare the results with the existing process and investigate differences against the agreed rules; the old list is a comparison, not assumed to be correct.

- We will check both customers included incorrectly and eligible customers left out.
- We will confirm that the mail house and email platform accept the files.

- We will use a fresh export to test saved corrections, changed records and unresolved cases.
- We will test approved CRM updates through the supported method and check the result in the source.

7. Learning Cycles & Progressive Automation

Reviewers would see the original record, the proposed change and the reason for it. They could approve, edit or reject it, with their decision recorded. Conflicting information would reopen the case.

A saved correction is not proof that the CRM changed. The tool would track each update as reviewed, submitted, confirmed or failed. It would keep failed updates visible for follow-up and require confirmation of the source value before marking an update complete.

Our team will use clear rules for repeatable checks. AI could help suggest links or interpret messy names, subject to Massey's data requirements. Unclear contact restrictions and sensitive changes would stay with a human reviewer.

Better targeting

Where data is available, the tool would retain campaign exposure, responses, purchases and referrals alongside the customer history. T.J. identified these as useful signals for choosing who to contact.

Lead ranking would be a separate, later step. Our team would start with reasons marketing can understand and test whether the ranking helps. A CRM replacement is not a prerequisite. Purchase probabilities would need suitable outcome data and validation before being presented as reliable.

8. User Acceptance & Rollout

Our team will agree on responsibilities with Massey before handoff.

Team	Responsibility
Marketing	Campaign rules, exception review and approval to release each list
IT / BI	Source access, CRM updates, monitoring and support
Operations	Service and property eligibility, including offers already in progress

BrightDesk and Massey will agree on the full handoff details later in the project, including what Massey will receive to operate the system without relying on BrightDesk after rollout.

We will adjust the rollout based on observed reliability, addressing errors before expanding use.

9. Integration & Architecture

Our team will work with Massey IT to choose hosting, access controls and data handling. Together, we will confirm how ServSuite and the Lead Log can supply the records needed for each campaign.

We will agree with Massey IT which corrections belong in which fields and test the supported update method. If direct integration is unavailable, we will assess a controlled import or IT-managed update. The tool would retain the original value and change history.

The demonstrated fields include Do Not Telemarket, Do Not Merge, Do Not Market: Mail and Do Not Market: Email. Our team will confirm their meaning and the treatment of deceased information with Massey.

Our team will work with IT to agree on secure transfer, storage, retention, backups and access. We will obtain approval before any outside address or AI service receives customer data.

10. Success Measures

Our team will compare equivalent campaigns before and during the pilot. We will agree targets with Massey after measuring the current process.

Measure	What to compare
Less cleanup	Time spent preparing lists and reviewing exceptions
More accurate audiences	Duplicates, unsuitable inclusions and eligible customers removed by mistake
Fewer repeat fixes	Corrections repeated after new exports; CRM updates confirmed or still unresolved
Fewer campaign delays	Campaigns held up by list problems and the reasons for those delays

Our team will estimate value with Massey using measured improvements and the costs they provide.

11. Software Development Life Cycle

Our team follows a structured software development life cycle (SDLC). We will work through these phases with Massey's marketing and IT teams, using agreed review points to decide when the work is ready to progress.

Phase	Deliverable	Acceptance point
Planning and analysis	Our team will map campaign workflows, source files, requirements, scope and access.	We will agree priorities with Massey.
Design	We will design linked customer records, campaign workflows, architecture and the review interface.	Marketing and IT will review the design.
Development	We will build a working prototype and refine the agreed campaign and correction features.	We will demonstrate the agreed functions.
Testing	We will test completed mail and email campaigns, file formats and supported CRM updates.	Marketing and IT will review results and approve readiness.
Deployment	Our team will configure agreed integrations and carry out a staged rollout and handoff.	Massey will approve production use after the agreed checks.
Maintenance	We will provide any support, fixes and improvements agreed with Massey.	We will review agreed changes and results with Massey.

BrightDesk and Massey will agree each milestone's deliverables and acceptance criteria and review progress before proceeding. Automation will require proven process reliability and approval.

12. Partnership & Pricing Discussion

This proposal focuses on the product and how our team would deliver it. If Massey would like to explore it further with BrightDesk, we will discuss pricing in a follow-up meeting.

Reusable functionality. Our team will retain the right to reuse, package and commercialize general-purpose components and functionality. This reuse will exclude Massey's data, branding and confidential information.

Delivery and handoff. BrightDesk and Massey will agree on the full handoff details later. The final agreement will define what Massey receives and its rights to operate and maintain the solution independently, BrightDesk's reuse rights, and each party's responsibilities.

Any later lead-ranking work or CRM replacement would be a separate decision.

13. Functional Requirements Ideation

ID	Capability	Expected behavior
FR01	Check incoming files	The tool would report missing fields or incomplete files before using them.
FR02	Link records carefully	The tool would keep people, households, properties and accounts distinct, with original IDs and reversible links.
FR03	Prepare a campaign	The tool would use saved rules and available current service, property and sales information.
FR04	Respect restrictions	The tool would honor person, channel and Do Not Merge rules and hold unclear cases for review.
FR05	Remember corrections	The tool would retain approved changes across exports and flag conflicting information.
FR06	Explain exclusions	The tool would show all reasons, count each removal once and let reviewers inspect mistakes.
FR07	Support review	The tool would show evidence and record who approved, changed or rejected a suggestion.
FR08	Release usable files	The tool would recheck the audience and produce the approved mail or email format.
FR09	Confirm CRM changes	The tool would track reviewed, submitted, confirmed and failed updates through a supported method.
FR10	Support the team	Our team will provide agreed access and monitoring, with handoff details decided together at that stage.