

Demand Spring Helps Fidelity Clearing Canada Implement Marketo Quickly and Efficiently



In 2019, Fidelity Clearing Canada undertook a six-city cross-Canada tour as part of the 10th anniversary celebrations. The marketing team found themselves with only five weeks to install and learn Marketo, get their instances up and running, and get event invitations out to partners, customers, and prospects across Canada. Fidelity Clearing Canada decided to bring in the experts from Demand Spring to help get its Marketo instances up and running quickly.

CLIENT PROFILE

Founded in Toronto in 2009, Fidelity Clearing Canada provides Canadian registered brokerage firms and portfolio managers with trade execution, clearing, custody and back-office support.

BUSINESS SITUATION

In 2019, Fidelity Clearing Canada celebrated its 10th anniversary. As part of the festivities, the organization hosted a six-city cross-Canada tour—not a small undertaking for the marketing and events team. The challenge they came upon when working through the planning schedule—because of delays in finalizing their Marketo contract and licenses, they had only five weeks to learn Marketo, get their instances up and running, and get

the event invitations out in order to give guests enough notice to attend.

The team at Fidelity Clearing Canada knew of Demand Spring from their work with Fidelity Investments in both the US and Canada, so decided to call upon the team to help them get Marketo implemented quickly.

The Demand Spring team outlined a plan to build out a bare structural support to send and track event registrations, and then to backfill the ‘normal’ setup once the anniversary events were completed. The team needed to produce

a multi-touch email program with event registration and database support out of very little—there was no database, no email templates, and even the basic email infrastructure (ie. CNAME configuration) was not yet set up.

THE SOLUTION

To produce the many communication assets needed to support the event, the team needed to take full advantage of Marketo’s token functionality. The Demand Spring and Fidelity Clearing Canada teams had a quick brainstorming session and sketched out the communications—looking for



“Without a lot of background into our business, Demand Spring asked the right questions and made insightful suggestions to understand how to implement a Marketo instance that works for our organization.”

JAMIE LEE ROGERS
SALES ENABLEMENT & EVENTS MANAGER
FIDELITY CLEARING CANADA

“We implemented Marketo on a very tight timeline with immediate deliverables, and Demand Spring brilliantly arranged our rollout to fit within these constraints while still planning for our larger objectives.”

JAMIE LEE ROGERS
SALES ENABLEMENT &
EVENTS MANAGER
FIDELITY CLEARING CANADA

any overlapping content, which would be turned into Marketo tokens that were dynamically integrated across communication assets.

Essentially, the team would fill out the key pieces of information at the top of the program which would populate throughout the 12+ email and landing pages for each event location. Incorporating tokens for ‘send from’ and specific signatures allowed the team to create invitations that were personalized and signed by the appropriate sales rep.

An efficient structure was developed—the event invite process that would normally take three to six hours per event took only one hour. Members of the Fidelity Clearing Canada team were able to quickly take over building the programs immediately after attending Marketo-led introductory training sessions.

The result of Demand Spring’s work was a rich, nuanced, multi-touch event program that was custom designed to meet Fidelity Clearing Canada’s specific needs.

ABOUT DEMAND SPRING

Demand Spring is an integrated Revenue Marketing consultancy that helps marketing organizations stand taller by enabling them to scale their ability to contribute to pipeline and revenue. Our team of Revenue Marketing Strategists, Content Marketers, and Marketing Technologists help our clients transform their marketing practices, deliver exceptional customer experiences, and drive revenue.

For more information, visit www.demandspring.com.

