

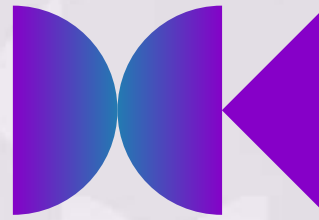
APTECO

Live

2025

Meet our finalists





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The award

The Best use of Apteco award 2025 honours the most inspiring and impactful use of Apteco to elevate marketing performance and the use of insight to transform the customer experience.

All delegates will be given the opportunity to vote for their favourite entry following a short video presentation from each of the finalists. The entry with the highest combined score out of 100 will win. The Apteco judges have already scored each entry and selected the finalists. The final score will be an equal combination of the judge's points and delegate voting. The entry with the highest total score will win.

What are the Apteco judges looking for?



Creative application to meet business and marketing goals



Strategic thinking of how Apteco helped shape or evolve the marketing approach



Commercial impact from ROI and campaign performance to streamlined processes



Effective and skilful use of Apteco software



Tangible improvements to the customer experience



Mind and Euler

Haylie Romo, Data Analytics Lead, Mind; Neda Rahimi, Data and Analytics Manager, Mind and Katherine Schofield, Analytics and Intelligence Manager, Euler

Mind's Do Your Own Thing (DYOT) fundraising initiative encourages supporters to raise money in their own way, from bake sales to marathons. DYOT is vital to Mind's income, generating around £3.5m annually, but recent years saw a 19% decline in participation, alongside inefficiencies in supporter communications. Manual processes meant welcome, thank you and payment emails were often delayed or missed altogether, weakening engagement and conversion.

To address this, Mind partnered with Euler to harness the full Apteco suite. FastStats was utilised to create virtual variables such as event and registration dates, supporter motivations and classifications. These helped to power a new fully automated journey in PeopleStage, with dynamic content tailored to supporter scenarios. Three core journey strands were built, flexing communications based on the time between sign-up and the date of the event. Automated emails now include timely welcomes, countdowns, 'good luck' and 'thank you' messages, followed by chasers for unpaid donations. Dynamic content further personalises messages – examples include messages in Welsh for supporters with a Welsh postcode, in-memory fundraisers and for specific event types.

The transformation between an inefficient, time-consuming journey to a fully automated one has been significant. Supporters now receive communications aligned to their event dates, rather than being based around the community team's availability/capacity to manually send out emails. Manual effort has been reduced by 10 hours per week, freeing up time to focus on nurturing better supporter relationships. Reporting with Orbit dashboards has also given stakeholders a new level of visibility over results.

Email click rates have risen from 5.35% in manual sends to 7.2% since the introduction of the automated journey, unsubscribe rates have remained low despite additional touchpoints and chaser emails have directly driven 34 fundraising payments that previously may have been lost. Conversion rates have grown from 28.5% to 39.6% year-on-year, with 81 additional event bookings recorded since the journey's launch.

By embedding Apteco technology at the heart of DYOT, Mind has delivered a consistent, timely and more engaging supporter experience. The new journey not only protects vital fundraising income but also strengthens long-term supporter loyalty, setting a foundation for future personalisation and growth.



VSO and Adroit

Kathryn Ginn, Head of Data and Insight, VSO and Pete Edgcombe, Account Director, Adroit

Transforming Supporter Journeys and Fundraising Intelligence at VSO through Apteco

VSO previously held supporter and volunteer data across multiple platforms, often with overlapping records. Adroit were tasked with creating a Single Supporter View (SSV) by integrating three key systems: Raiser's Edge, Salesforce, and Job Science. This required ongoing standardisation using PAF components and complex arbitration rules to unify records – both as a one-off transformation and ongoing synchronisation. The resulting SSV layer enabled structured, deduplicated data to flow into Apteco, significantly enhancing its power and usability.

The Apteco solution has now become the strategic backbone of VSO's supporter engagement and fundraising activity. It sits at the heart of supporter communications, enabling a step-change in sophistication and targeting. The platform now supports multi-channel automated communications such as new supporter Welcome journeys and Regular Giving Conversion journeys. A regression-based ask strategy model has also been implemented via Virtual Variables, allowing personalised ask amounts to be scaled across campaigns.

Apteco Email and SMS functionality has been piloted to automate communications. In summer 2025, an SMS campaign formed part of the Summer Appeal. While uplift was modest – limited by robust testing only within less-engaged segments – the campaign delivered a positive return and performed a valuable data-cleansing role. Learnings from this will shape future SMS use, which VSO sees as a rapid-response test and learn channel. Both Email and SMS are now priority channels, enabled Apteco's journey automation and a readiness for future use of soft opt-in data.

This growing sophistication is enabling VSO to take a longer-term strategic view. The initial Regular Giving Conversion campaign has delivered early conversions, with projected retention rates indicating a strong long-term ROI. With Apteco underpinning model integration, channel orchestration, and audience segmentation, VSO now has a platform from which to test, learn and grow its fundraising.

Apteco is no longer simply a data tool - it is a strategic enabler supporting VSO's supporter engagement ambitions, delivering smarter journeys and laying the foundation for future innovation through social integration and advanced modelling.

Apollo and Bertelsmann Marketing Services

Michael Narr, Head of CRM & Marketing Cooperations, Apollo-Optik Holding GmbH & Co. KG and Julian Hartmann, Director Loyalty & Experience | Recall, Campaign - part of Bertelsmann Marketing Services

Multi-Stage CRM Campaign for Customer Satisfaction

For our Apteco Awards submission, we are proud to present a multi-stage CRM campaign that was fully designed and executed within Apteco, with customer satisfaction placed at the very center. The goal of this initiative was not only to capture meaningful feedback but also to translate it directly into actionable, customer-focused improvements through a dynamic and highly personalised process.

The campaign was structured as an automated, multi-stage flow anchored in a customer satisfaction survey. It began with an initial email that included a short questionnaire to measure the Net Promoter Score (NPS). Customers who did not respond were automatically sent a reminder email after a defined period of time, significantly increasing overall response rates.

What truly sets this campaign apart is the individualised response to the feedback received:

- Promoters (9–10 points) received a thank-you message with an invitation to share their positive experiences.
- Passive customers (6–8 points) were asked for specific suggestions for improvement, enabling the business to identify opportunities to strengthen their satisfaction.
- Detractors (0–5 points) were sent a personalised message that included an additional questionnaire tailored to their concerns, along with a direct option to contact the customer service center. This approach made it possible to uncover deeper issues and proactively implement corrective measures.

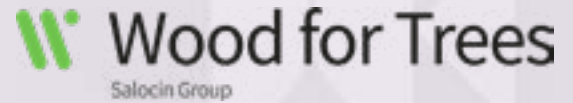
Thanks to Apteco's powerful flexibility, all logic and branching were handled seamlessly within a single campaign flow. This not only minimised manual effort but also ensured that each customer received the right message at precisely the right time.

The results speak for themselves: a high participation rate, valuable qualitative insights, and a clear, measurable increase in customer satisfaction. Beyond retention, the same multi-stage approach has also proven highly effective in customer acquisition, where personalised engagement drove stronger connections with prospects and contributed to an exceptional boost in satisfaction levels across the customer base.

This case illustrates how Apteco enables organisations to manage complex customer journeys with ease, driving tangible business results while creating genuine value for both customers and the company.



For children and
equality for girls



Plan International UK and Wood for Trees

Jonathan Gibbs, Analysis and Insights Manager, Plan International UK and Nick Cook, Head of Business Applications - Apteco, Wood for Trees, Salocin Group

Plan International UK (PIUK), supported by Wood for Trees, transformed their approach to legacy fundraising by harnessing the advanced modelling power of Apteco's Predictor bundle.

PIUK had relied on an agency-built legacy propensity model to identify likely legacy supporters. Whilst it worked, this approach was costly, had limited flexibility and limited PIUK's ability to adapt quickly. In 2024, PIUK chose to bring this capability in-house, upgrading their Apteco FastStats license to the Predictor bundle. This shift gave them ownership of their modelling, reduced long-term costs and aligned with their strategic ambition to become more supporter-led and insight-driven.

With training and guidance from Wood for Trees, PIUK built a new legacy propensity model using Apteco. They explored both decision tree and profile models, testing and refining dimensions such as giving history, campaigning activity, gift aid, age and gender. The decision tree model emerged as particularly effective – delivering sharper segmentation, stronger predictive accuracy and clear guidance for campaign targeting.

Crucially, Apteco's intuitive environment enabled PIUK to test, refresh and adapt their models with speed and confidence. They could overlay results with supporter responsiveness by channel, helping them identify entirely new audience segments who had not been contacted about legacy giving for years. This insight created exciting opportunities to re-engage supporters through the most appropriate channels.

The results were impressive. Legacy intenders increased by more than 300% and legacy pledgers rose by 15% compared with the previous model. By using their legacy ROI calculator, PIUK could see that these improvements could equate to a potential £262,963 of future legacy income. Beyond the numbers, the project has equipped PIUK with the tools and skills to create further models at no extra cost – unlocking lasting value for the charity.

By adopting Apteco's Predictor bundle, PIUK has not only improved immediate campaign performance but also embedded a sustainable, insight-driven approach to legacy fundraising. The project is an example of how data, analytics and creativity can combine to drive growth, efficiency and meaningful supporter engagement.

Department of Health and Social Care and Paragon DCX

Caroline Monzani, Marketing Activation Campaign Lead, Department of Health and Social Care and Matt Foord, Apteco Practice Lead, Paragon DCX

Paragon DCX are proud to have supported the Department of Health and Social Care (DHSC) public health campaigns since 2009, with Apteco software at the heart since 2017. DHSC exists to help people live more independent, healthier lives, for longer: levelling up the nation's health and reducing health disparities.

The 'How Are You' (HAY) quiz and supporting email journey initially went live in 2016 and brought a new focus to the adult audience, particularly those aged 40-60, encouraging and supporting the target audience to eat better, move more, drink less (alcohol) and stop smoking.

HAY significantly exceeded all targets and gained great reach with almost 1.4m sign-ups to email support from the quiz, but changes in policy and areas of focus meant it no longer aligned entirely with DHSC priorities.

In 2025 a new health quiz was created to cover behaviours relating to a wider set of challenges faced by the public and relaunched as 'Healthy Choices' under the 'Better Health' brand. The revamped quiz meant capturing a greater wealth of data as answers and results, enabling a wider scope of tailored health advice covering vaping, sleep and mental health along with the original topics of eating, physical activity, smoking and alcohol. An entirely new suite of communications and associated journey logic was created for the new Healthy Choices programme.

Advanced logic in the Apteco platform determines the hierarchy of topics for each user, based on their answers and results and the behaviour changes which could make the most significant impact to their health. This hierarchy is used to drive the personalised 4-week journey, providing tailored advice on the 1-3 priority areas for each user. A post-programme survey captured feedback and enabled us to measure the impact of the programme. Results are displayed in Orbit reports.

68% of responders said that they had made healthier choices as a result of the communication journey.

66% of responders said that they felt they had some or a lot of support available to help them make healthy changes, a 25% increase compared to pre-journey answers.



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