



## SAS® Marketing Automation

An integrated marketing platform for closed-loop marketing with campaign management, advanced analytics, data integration and business intelligence

### What does SAS® Marketing Automation do?

SAS Marketing Automation enables users to rapidly create, modify and manage marketing campaigns ranging from simple to sophisticated, multi-channel campaigns. Users can define target segments, prioritize selection rules, select communication channels, schedule and execute campaigns, and perform advanced analyses to predict and evaluate the success of customer communications.

### Why is SAS® Marketing Automation important?

By providing the ability to improve marketing's effectiveness, SAS Marketing Automation leads to a better return on marketing investment and a healthier bottom line. Designed to function through an intuitive visual interface and built with the flexibility to take advantage of a company's existing infrastructure and systems, this solution is the most powerful, comprehensive marketing automation offering available.

### For whom is SAS® Marketing Automation designed?

SAS Marketing Automation provides capabilities for multiple users within the marketing organization, including marketers who define communication strategies, executives who need reports on marketing effectiveness, campaign managers who create target segments and execute campaigns, and analysts who model and predict customer behavior.

As the global marketplace becomes more complex, with more consumers, channels and competition, marketing organizations must be more innovative in communicating with customers. Ensuring maximum marketing ROI requires an analytic approach to marketing that offers predictive insight into customer behavior and campaign effectiveness.

Customers want to feel as though companies understand them – and they expect to be treated consistently across every communication channel. Having an accurate, consolidated view of how and when customers are contacted and how and when they responded across all channels of communication ensures consistency.

Industry analysts continually point to poor data integration as a top cause for the failure of CRM initiatives. Even with “good” data, most organizations struggle to use customer data effectively for designing, delivering and tracking marketing campaigns.

Part of the challenge is that many companies must market to millions of customers. This volume makes effective marketing extremely complicated, potentially involving hundreds of people throughout an organization.

SAS Marketing Automation provides an integrated marketing software solution that includes robust campaign management, analytics, data integration and business intelligence to support every role across the organization – empowering marketers to deliver campaigns that are targeted and tracked for maximum benefit.

### Key benefits

- Easily create marketing campaigns.** These can range from simple to very complex, from planned marketing programs to opportunistic communications aimed at a precise audience. SAS Marketing Automation's core component enables campaign managers to graphically create multichannel, multistage campaigns.
- Coordinate campaign activities across the enterprise.** To streamline the process of coordinating campaigns across different lines of business or different regions, SAS Marketing Automation also provides a Web-based client that lets product managers or segment managers synchronize their activities with the campaign management team. Targeted campaign lists developed in SAS Marketing Automation can easily be incorporated into fulfillment channels, regardless of channel technology.
- Improve marketing performance.** SAS Marketing Automation provides a reporting framework for easily managing the performance of marketing campaigns. This framework allows marketers to track and analyze how campaigns are running while providing a consolidated view across all channels and interactions – using a consistent reporting framework that exists throughout the SAS Customer Intelligence suite.
- Lower total cost of ownership (TCO) by maintaining compatibility with existing systems.** SAS Marketing Automation can access data in any form from virtually any source. This means that a company's existing investments in enterprise resource planning and operational systems can be extended, and



enterprise data integration won't be complicated by the unique needs of marketing and analysis teams. SAS Marketing Automation allows users to insert SAS processes directly into a campaign diagram, so previously built code can still be used.

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## Solution overview

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For any marketing organization, SAS Marketing Automation provides unmatched power and flexibility for coordinating and delivering analytically driven customer communications. SAS provides an intuitive environment for accomplishing all of the tasks needed to ensure successful marketing campaigns.

### Customer segmentation, profiling and testing

SAS Marketing Automation provides graphically driven selection tools for determining the appropriate target audience for any campaign. Marketers can view histograms to determine trends and make selections, or they can perform cell splits randomly or based on variables available in the customer data. Embedded cluster analysis also allows for advanced segmentation of customers. Because such powerful tools can be used so easily, marketers can be more efficient and effective, producing smarter, better targeted, more profitable campaigns.

### Campaign planning, execution and management

With a portal-driven dashboard, marketers have a single point for managing all of their marketing activities. A campaign checklist provides a list of tasks required to complete any given campaign, and process-driven campaign flows make it easier to create campaigns quickly and manage hundreds of campaigns simultaneously every day. This checklist includes an approval step that requires sign-off by designated individuals for each campaign.

In addition, each step of the campaign process flow is presented in a way that reduces diagram clutter, thus enabling users to create simple or complex campaigns in a manageable way. SAS Marketing Automation also allows for various levels of authorization and enables campaign diagrams to be shared and linked. This means, for example, that your chief privacy officer – and no one else – can maintain a global “do-not-call” policy that updates automatically over time and is incorporated into every planned communication. By logging all system activities and using an “open-box” approach to analytics across the entire platform, audits and related activities can be completed more easily. Only SAS lets you perform “analytic auditing,” so you can ensure that marketing models comply with any current or future legislation.

### Treatment management

SAS Marketing Automation contains a facility to create, view, edit and delete treatments (offers). The user can select treatments from a list and include them in individual campaigns. Contents of the treatments can be viewed, including custom details as well as images of the treatment. Treatments that have been updated can either be accepted or rejected for use in individual campaigns. Updated treatments that were once rejected can be accepted at a later time. In addition, treatments that were created outside of SAS Marketing Automation can be viewed, edited and deleted within SAS Marketing Automation.

### Advanced analytics

Using SAS Marketing Automation, marketers can view interactive reports dynamically to profile customers and perform quality assurance on campaign selections. They can also incorporate the results of predictive analytics into campaigns. The interface provides powerful clustering and segmentation capabilities as well as direct integra-

tion with SAS® Enterprise Miner™, the industry standard for data mining, which is included to ensure that communications are backed up by sound intelligence.

### Integrated business intelligence

Only SAS Marketing Automation combines customer intelligence with business intelligence in one solution. Because it was built on the platform for SAS Business Analytics, SAS Marketing Automation lets everyone in your organization get information the way they want it – Web reports, OLAP analysis, e-mail alerts, even SAS-generated tables and charts in Microsoft Office.

### Data integration

SAS' comprehensive data integration capabilities enable companies to address every aspect of managing customer data, from ETL to data quality. SAS has both the solutions and the domain expertise to address data integration, including industry-specific data models that assist customers in deploying enterprise-level marketing solutions. SAS storage options also include support for star schemas, dynamic clustered tables, parallel loading into virtual tables and improved integration with SAS Data Integration Studio.

### Administration and security

SAS Marketing Automation provides an administration environment to manage all SAS solutions across the enterprise, helping reduce costs and improve productivity. For marketers, this environment allows the administration of:

- User profiles and security access by providing the ability to assign users to groups and assign permissions based on business needs.
- Enterprise metadata.
- Campaign and marketing process scheduling.
- Server access and availability.

- Data integration across multiple data sources.
- Auditing and logging.

### **Extensibility to address broader marketing needs**

SAS Marketing Automation can be extended through its integration with other SAS solutions to provide even more benefit for marketers.

**SAS Marketing Optimization** uses sophisticated mathematical techniques that provide a plan to optimize your communications goals. As a result, you'll maximize economic outcomes while taking into account resource and budget constraints, and the likelihood those customers will respond. In-line integration between SAS Marketing Automation and SAS Marketing Optimization automates the handoff between campaign managers and marketing analysts. Integration between SAS Marketing Automation and SAS Marketing Optimization can be scheduled on a recurring basis with no manual intervention required.

**SAS Interaction Management** is an event-driven marketing system that understands and tracks changes in customer behavior.

**SAS Digital Marketing** provides e-mail, SMS and RSS personalization capabilities, which are a natural extension to SAS Marketing Automation for customers who actively incorporate digital marketing into their marketing efforts.

**SAS Web Analytics** enables companies to understand customer behavior on the Web (e.g., transactions, registration, repeat visits and clickstream behavior). This analysis helps you determine the most effective means of communicating with customers both online and offline. It also helps you spot Web usability issues that may have hindered the effectiveness of your campaigns.

## **Key Features**

**A user-friendly interface that includes three-dimensional diagram design and the ability to add notes, text and images. Also includes easily accessible panning, selection and layout tools.**

### **Customer segmentation, profiling and testing**

- Create selection criteria using pick lists and histograms.
- Multiselect nodes enable complex segment creation but decrease diagram clutter.
- Wildcard selection support.
- Create test cells and other splits using percentage, count and analytic techniques. Splits can include remainder rows.
- Calculated columns that include count, sum, average and other formulaic expressions.
- Virtual storage of calculated columns for dynamic or batch deployment.
- Decile and quantile ranks for banding, ranking and selection.
- Customizable filters for list creation.
- Waterfall view of selection criteria.
- Select from any entity level (e.g., household, customer, account, business) within a campaign.
- Switch between entity levels while building campaigns.
- Custom node creation that easily extends capabilities beyond the standard offering to address all client segmentation, profiling and testing requirements.
- E-mail notifications for a variety of events such as approvals, checklist status changes, deployment, execution and scheduling.

### **Campaign planning, execution and management**

- Easily create, view and edit campaign diagrams.
- Easy sharing and reuse of campaigns and campaign components.
- Prioritize communications within and across campaigns.
- Configurable views into the marketing process.
- Approval processes to ensure proper sign-offs before campaigns are executed.
- Configurable ROI estimation, break-even analysis, budget-to-actual comparison and what-if analysis at any level of the campaign structure. These can incorporate activity-based cost information from solutions such as SAS Activity-Based Management.
- Capture costs for a campaign on a per-piece or per-thousand basis and then calculate the cost for each segment.
- Estimate and track multiple costs and revenues for any offer.
- Incorporate campaign- or communication-specific data from templates.
- Create specific campaign definitions and campaign fields, as well as communication definitions and communication fields.
- Gantt chart view of campaigns and communications.
- Respond to outside events, such as e-mail click-through, call center responses or event triggers from SAS Interaction Management.
- Leverage Web site insights from SAS Web Analytics to drive future campaigns (for example, by analyzing customers that end Web sessions without purchasing items in their shopping carts).
- In-line integration with SAS Digital Marketing to provide personalized e-mail, SMS and RSS message creation, delivery and response management.
- In-line integration with SAS Marketing Optimization to ensure the most optimal allocation of customers in marketing campaigns that can be executed without manual intervention.
- A new Web user interface allows remote or distributed users to open, review, approve and edit campaigns and communications, and publish campaign reports.
- View campaign-related creative collateral - including brochures, inserts, e-mail, banner ads and other documents.
- Create business descriptions for all fields.
- Direct and indirect response management.
- Campaign briefs for planned or active campaigns.
- Custom node creation that easily extends capabilities beyond the standard offering to address all client planning, execution and management requirements, as well as support for cascading prompts.

**SAS OnDemand: Marketing Mix Advisor** provides a range of capabilities – including marketing-mix modeling, marketing investment simulations and guided analyses – that help companies understand the business value of investments such as advertising, promotions, incentives, direct mail, events and the Web. This analytically driven, top-down marketing performance management solution provides an ideal foundation for your direct marketing campaigns while keeping you in sync with mass-marketing activities.

**SAS Real-Time Decision Manager** combines SAS Analytics with business logic and contact strategies to deliver real-time decisions and recommendations to interactive customer channels such as the Web, the call center and the point of sale.

### Technical requirements

SAS Marketing Automation is a multithreaded, open-standards-based, J2EE-compliant solution built on the flexible platform for SAS Business Analytics. Because of this architecture, server components support a wide array of operating systems and leading database products such as DB2, HP Neoview, Netezza, Oracle, SAS® Scalable Performance Data Server®, SQL Server and Teradata. No other marketing software product can match the performance and degree of integration provided by SAS. This solution's flexibility also allows for easy migration from other campaign management tools such as Doubleclick, Valex, Unica, Epiphany and Teradata.

### Key Features (continued)

#### Campaign measurement and analysis

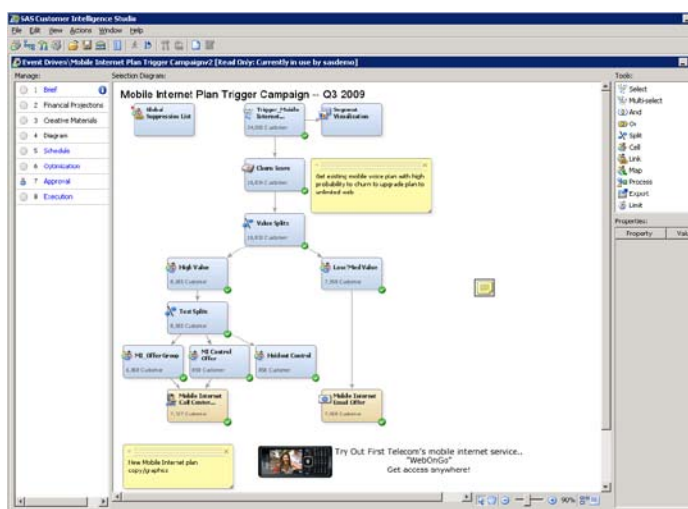
- Record contact history at any level (e.g., customer, account, household, business).
- Common reporting data model to support contact history, response history and performance analysis across SAS Customer Intelligence solutions.
- Quickly browse and profile customer data for quality assurance.
- Drag-and-drop interface for creating entity relationship diagrams.
- View complete table information.
- List all values for a categorical field.

#### Advanced analytics

- Drag-and-drop clustering for advanced segmentation and analysis.
- In-line visual analysis to refine campaign plans.
- Register and execute models from SAS Enterprise Miner.
- Import models, analyses and macros (called SAS Stored Processes) created with a drag-and-drop interface in SAS® Enterprise Guide®.
- Custom node creation that easily extends capabilities beyond the standard offering to support all advanced analytical requirements.
- Support for statistically significant sample sizes to assure proper sizing of control groups.
- Split groups by deciles, quartiles and decimal percentages.
- Incorporate SAS and SQL code to be easily incorporated in a graphically designed campaign.
- Use model scores just like any other data column.

#### Administration and security

- Set administrator, group and user permissions down to the row level.
- Assign permissions according to business need.
- Administrative logging for troubleshooting and system maintenance.
- Create multiple campaign-level templates.
- Share folders and other objects between user groups.
- Administer user objects in folder view.
- Create groups of custom details for reuse.
- Simultaneous user access.
- Support multiple lines of business in the same environment. Product lines, customer segments and geographies can be managed independently while sharing the same system.
- Build campaigns using separate development, testing and production environments.



*SAS® Marketing Automation allows users to build simple or complex campaigns using an intuitive graphical interface.*



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