

# Your marketing technology pre-flight checklist

## 5 Marketing Technology Goals for SMBs

Just as pilots know that thorough preparation is the key to a successful flight, small and midsize businesses (SMBs) need a clear plan to accelerate from zero to launch as simply as possible. **Here's your checklist for getting started.**



STEP 2

### Chart the right course

**Prioritize your use cases at the outset.** Aim to maximize both potential impact and probability of success. Target expected outcomes and reduced manual processes.

**Achieve:**

- ✓ Automated hyper-personalized communications
- ✓ Improved customer retention
- ✓ Streamlined marketing operations

STEP 1

### Pick your destination

**Nearly two-thirds of SMB leaders recognize technology as a key driver of their business goals.**

When investing in MarTech, build a compelling business case that clearly pinpoints a specific marketing challenge.



40% increase in campaign revenues<sup>1</sup>



40% increase in conversion rates<sup>1</sup>



30% decrease in churn rates<sup>1</sup>



STEP 3

### Don't wing it on data

**Your data doesn't need to be flawless,** but it must be clean and accessible to start. Where is the data stored? Is it easily accessible? How reliable is it?



53% of SMBs are unaware of the insights their data could offer<sup>2</sup>



52% of SMBs don't fully understand the ROI that analytical tools can deliver<sup>2</sup>



STEP 4

### Assemble your crew



**Identify the critical skills on your business and IT teams.** Clearly defining roles and addressing skill gaps fosters a smooth journey from planning to execution.



STEP 5

### Land on the right outcomes



**Whether your goal is to expand your audience, gain deeper insights, deliver personalized experiences, or engage with customers more meaningfully,** choosing the right MarTech tools is essential for achieving measurable success.

# Successful flights



## Challenge

**Fratelli Carli** is a century-old, family-owned Italian olive oil company that fulfills 1.5 million orders each year. When company leaders set a goal of improving its publication and communication channels to better meet its customers' needs and expectations, they knew the first step was better understanding their customers.

## Solution

In choosing SAS to help meet this challenge, they were able to realize two important benefits. First, advanced analytics capabilities from SAS allowed the company to extract useful insights from massive amounts of customer data. With SAS® Customer Intelligence 360, they used these insights to craft campaigns that responded dynamically to changing marketing requirements. The combination of marketing technology and advanced analytics capabilities gives Fratelli Carli the ability to deploy smarter campaigns, faster.

Before using SAS, marketers worked independently of the data scientists and analysts responsible for offering insights on campaign performance. As a result, these insights were often not available until it was too late to affect campaign outcomes. Today the teams work collaboratively and seamlessly throughout the campaign lifecycle.

## Outcomes

In the next phase, Fratelli Carli plans to use SAS tools to move beyond traditional marketing methodologies (such as Recency, Frequency, Monetary Analysis) to deploy machine learning techniques that can improve engagement. Machine learning models running in SAS Viya can be easily integrated into SAS Customer Intelligence 360, allowing marketers to deploy them in a matter of minutes.



## Challenge

Seeking a way to deploy smarter, more integrated marketing campaigns, online insurer **InShared** needed a new campaign management solution that prioritized ease of use and strong integration capabilities – all while working seamlessly with the company's online platform.

## Solution

The company chose SAS Customer Intelligence 360 as its new omnichannel marketing platform. Before adopting SAS Customer Intelligence 360, InShared frequently sent commercial mailings – both targeted campaigns and occasional “blasts.” For example, all customers who selected a car insurance policy were also offered home

insurance. “Now, when selecting the right offer, we can make a better match between the type of customer and the insurance product,” said Martin Lodewijks, business analyst at InShared.

## Outcomes

Today the company is running more targeted email campaigns, and its people are better prepared with the insights they need to make effective campaign decisions. “Although we’re running more and more campaigns, we can still manage it with a relatively small team,” Lodewijks said. “SAS enables business users to work independently, being less reliant on IT. That considerably shortens the time to market for our campaigns.”



## Ready for takeoff?

When you're ready to elevate your marketing technology strategy, we're here to help you soar.

Visit [sas.com/marketing](https://sas.com/marketing) to learn more about **SAS Customer Intelligence 360**.



<sup>1</sup>SAS customer results

<sup>2</sup>Amazon Web Services survey. <https://aws.amazon.com/blogs/smb/why-small-and-medium-businesses-are-missing-out-on-the-full-benefits-data-can-provide/>

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