# SAS® 360 Plan

## Centrally manage your marketing life cycle

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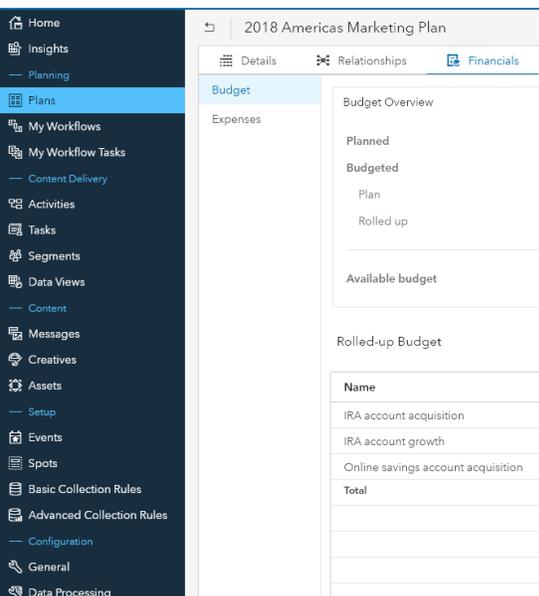
## What does SAS® 360 Plan do?

SAS 360 Plan accelerates, automates and streamlines all marketing planning activities so you can be agile and accurate in accounting for investments in marketing initiatives. Because it's a software-as-a-service (SaaS) solution, organizations can get started quickly and benefit from continuous enhancements to the system.

## Why is SAS® 360 Plan important?

It enables marketing departments to operate more efficiently and demonstrate greater accountability by optimizing marketing operations end to end – from strategic planning and budgeting, to resource and marketing content management, to global marketing execution and analysis and more.

## For whom is SAS® 360 Plan designed?

It's designed for organizations to enable all marketing teams (e.g., managers, project managers, creative designers and agency partners) to collaborate and help you systematically plan, manage and execute marketing activities more efficiently and effectively than ever before.

## Benefits

- Streamline marketing operations by integrating and managing all marketing processes across your business for greater consistency, efficiency and effectiveness – from marketing strategy development and planning, to content creation, campaign execution, and post-campaign analysis.

- Integrate channel planning and execution, including web, mobile and email delivery. Marketers across the organization can better align and understand how each activity fits together, as well as the financial and timing implications of every task.

- Get campaigns to market faster by aligning staff around a common marketing enablement infrastructure so they spend less time managing communications between disparate departments and functions and more time on lucrative campaign activities.

- Make the most of your assets by fostering greater collaboration among marketers with an integrated infrastructure that facilitates the sharing of effective processes and materials that marketers might otherwise keep on their own PCs or departmental servers.

- Demonstrate greater accountability. Gain complete visibility into time frames, costs, overruns and performance via calendars, user interface and contextual reporting.

- Strengthen and protect your brand. Enhance your brand's value by ensuring that all your content and marketing materials are brand-compliant and meet all usage specifications.

- Use analytical insights to improve future marketing activities.

## Overview

The growing recognition of the value marketing can bring to a company has led to increased demands for transparency and accountability, and marketers face constant pressure to achieve optimal results with allocated budgets that are constantly in flux. Economic uncertainty has put additional pressure on marketing departments to improve their effectiveness and efficiency to get the highest return out of every investment.

SAS 360 Plan enables you to optimize your marketing operations end to end with capabilities for planning and financial management, creative production management, reporting and analytics, integrated calendars and marketing asset management. We help you minimize processing time and SAS 360 Plan scales to meet enterprise needs, enabling you to handle more data, more users and even more complex planning as your needs change.

## Strategic planning

SAS 360 Plan provides stakeholders with full visibility into marketing plan objectives and schedules and enables them to create and approve plans collaboratively and transparently.

You can create and store marketing plans – along with comprehensive supporting information – in a centralized repository that enables easier management, tracking and retrieval. Easy access to detailed campaign information helps ensure that the best options are selected during the planning stages of marketing campaigns and activities.

## Financial management

With an integrated and aligned budget, you always know how much (and where) you've invested. Your budgets are always up to date, and you can easily track the progress and effect of your marketing activities. This information is then used to create and automatically update marketing plans and calendars. In addition, you can:

- Track spending and schedules at multiple levels – from marketing plan level down to the campaign level – as market conditions change throughout the year.
- Associate marketing objectives with expected results for each marketing program and campaign.

## Calendar management

An integrated calendar management system lets you plan and allocate resources effectively for various marketing activities, projects or workflows.

You can also manage and track resources throughout a project's execution phase and accommodate changes with greater transparency, collaboration and accountability across marketing teams. Integrated calendars enable marketers to track and monitor timing of plans, programs, campaigns and execution tasks to ensure timing is appropriate from both a business and a customer perspective. Integrated calendars for workflows and workflow tasks help ensure projects are completed on time.

## Marketing workflow

SAS 360 Plan workflows provide real-time visibility into project timelines. They also provide workflow capabilities and predefined templates that enable you to:

- Define detailed process steps and timelines for creating marketing deliverables.
- Designate internal employees, external marketing partners and vendors as owners, contributors, approvers or reviewers.
- Attach or share marketing briefs to a process step to better communicate with external partners.

- Configure and automate standard business processes to facilitate collaboration across all stakeholders.
- Tailor automated workflows to match specific business processes with configurable conditional paths and actions.

You can configure workflow tasks to share specific information, provide instructions or add relevant attachments and other information about items that require attention. The system automatically sends notifications to contributors. Recipients can respond via the system.

Changes to project timelines or associated deliverables are automatically calculated by the system based on the project's status or changes made by the project manager.

Workflows are tightly integrated with a digital asset management system, which enables project managers to add approved files to the asset library directly from the workflow interface. Workflows for the creative production cycle and storing approved content in a single cross-channel repository helps ensure compliance and promotes a consistent brand experience across channels.



Data-driven flow through all marketing planning needs: strategic planning, workflow, calendar, digital assets and financial management.

SAS 360 Plan enables integrated annotations for image and video files to:

- Promote compliance. Reviewers and marketers can easily view a consolidated list of comments directly in creative content.
- Provide faster time to market. SAS 360 Plan reduces review cycles by providing more context-specific comments for creative designers.
- Facilitates collaboration across all stakeholders from creative designers to legal reviewers.

Review steps are bundled into a single interface that electronically routes documents for approval along with any additional requirements (e.g., review window duration) and instructions, which improves efficiency and reduces errors.

Advanced routing capabilities enable simultaneous or sequential routing of documents to reviewers. Automated notifications keep reviewers on track to ensure adherence to deadlines. All comments are consolidated automatically in a single, final document.

## Digital asset management (DAM)

Content management capabilities that integrate with any of your DAM or content management systems let you extract maximum value from your organization's entire collection of media assets. A secure infrastructure lets you manage and control multiple versions of these assets, catalog assets in a configurable folder structure, and easily retrieve assets for quick preview and effortless distribution.

The DAM enables you to organize assets using a folder structure. Users can easily add tags to assets and find content through intuitive search and filtering capabilities. The administrator can define custom metadata fields to help you capture all relevant business information for each asset. The system provides full versioning support and allows easy storage and retrieval of custom renditions so users can find needed formats or file sizes for specific activities.

## Key Features

### Strategic planning
- Configurable planning hierarchies.
- Marketing plans, listing programs and integrated campaigns definition and tracking.

### Financial management
- Planning and cost-center budget allocation.
- Expense tracking in the form of commitments and invoices for marketing activities.

### Calendar management
- Integrated calendars for planning items, workflows and workflow tasks.
- Configurable calendar display options.
- Defines and tracks timing for marketing plans, programs, campaigns and tasks.
- Search and filtering capabilities directly from calendar views.
- Choose from color-coding options based on object type, status or channel.

### Marketing workflow
- Management of the execution of marketing processes to support execution of programs and campaigns.
- Defines marketing process steps and allows flexible workflow configuration.
- Sends electronic notifications.
- Calculates time lines automatically.
- Electronically routes marketing documents for review and approval.
- Consolidates reviewer comments and manages multiple revisions.
- Supports annotations of image and video files to facilitate collaborative creative content review cycles.

### Digital asset management
- Digital asset organization using tagging, cataloging and easy search and distribution.
- Version management capabilities.
- Rich media assets support.
- Marketing workflows integration for digital assets.

### Configurability
- Custom metadata definition for all SAS 360 Plan objects, including planning items, assets and workflows.
- System configuration that matches your business needs and ensures all the relevant data is captured.
- Dependency on secondary systems for marketing operations eliminated.
- Collaboration with all stakeholders by providing visibility into the relevant data.

### Integration
- Public APIs that integrate easily with third-party systems for ERP, CRM and CMS.
- Microsoft Excel integration for batch imports, exports and updates.
- SAS 360 Engage integration.

Asset insights allows users to track usage and performance of assets across digital channels. Marketers can use these insights to select the best asset for future marketing activities.

## Integrated execution

SAS 360 Plan is wholly integrated with SAS 360 Engage. Marketers can view all content in their content management system or other DAMs. Users can also view and manage budget, calendar and other information directly in a mobile in-app message or personalized email campaign and at the customer journey level. Open APIs and purpose-built user interfaces make this easy for today's modern marketer.

**TO LEARN MORE »**

Learn more about SAS Customer Intelligence 360: sas.com/sascustomerintelligence360.

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