



### What does SAS® Marketing Automation do?

SAS Marketing Automation lets you get more campaigns out the door in an automated, trackable and highly repeatable fashion. You can quickly define target segments, prioritize selection rules, select communication channels, schedule and execute campaigns, analyze campaign results and easily make adjustments to improve future campaign performance.

### Why is SAS® Marketing Automation important?

SAS Marketing Automation helps you increase retention and growth of current customers and boost your new customer acquisition rates, leading to a better return on your marketing investments and a healthier bottom line.

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

SAS Marketing Automation provides distinct capabilities to a variety of marketing users - from the CMO quickly viewing campaign reporting results down to the marketing analyst designing and executing a marketing program or campaign.

# SAS® Marketing Automation

Fast, multichannel marketing execution. Unmatched usability. World-class analytics.

## Overview

Today's consumers are web-savvy, mobile-loving people who spend more time online than reading magazines or watching TV. As consumer behaviors and expectations have radically changed, so has marketing - in ways that blur the lines between direct and mass marketing efforts.

Regardless of your role in marketing, to reach consumers you must meet them where they like to play - on the Internet, through mobile devices and on social media sites. You also need to personalize messages, tailor offers and engage customers in interactive dialogues that build trust and loyalty. Marketing automation is essential for taking full advantage of customer intelligence, optimizing interactions across channels, and monitoring and responding to changes in customer behaviors.

SAS Marketing Automation is a comprehensive solution for planning, testing and executing marketing campaigns in a way that improves marketing efficiency and effectiveness. By retaining and growing your current customer base, as well as acquiring new customers, you can achieve

a better return on investment and a healthier bottom line. SAS Marketing Automation provides all the capabilities you need to succeed, including:

- Easy-to-use, industry leading campaign management capabilities.
- Unmatched customer analytics for campaign targeting.
- Data integration for access to all vital customer data.
- An enterprise business intelligence platform for robust reporting.

## Key Benefits

- **Complete more campaigns, faster.** A made-for-marketing interface along with automated, trackable, easy-to-repeat processes let you get more campaigns - from simple to complex - out the door faster.
- **Achieve better targeting and higher response rates.** Unmatched analytical capabilities let you to turn customer insight into highly targeted segments. You can create highly accurate retention, cross-sell/up-sell and response models, determine ideal product mixes and next-best offers, and send more effective communications. Better analytics means better targeting, higher response rates and an improved ROI.
- **Get all the right data, where and when you need it.** Custom information mapping technology means the enterprisewide customer data you need - whether it's online social data or offline channel data - is available and accessible. And clean. Data quality processes - deduplication, standardization, cleansing, appending - ensure that your customer data is trustworthy and valuable, and ready for analysis.
- **Customize your campaign processes so they work for you.** Because one size does not fit all, the solution lets campaign designers use SAS code to create custom campaign management tools and processes based on unique business requirements to handle those situations where standard ones fall short. And once created, custom tools, processes and other campaign artifacts can be stored and used again and again, any time the need arises.

## Product Overview

SAS Marketing Automation provides any marketing organization with unmatched power and flexibility for coordinating and delivering analytically driven customer communications. The software's intuitive environment helps marketers accomplish all the tasks needed to ensure successful campaigns.

Many organizations use a mishmash of miscellaneous tools for campaign management across different departments or lines of business. But you don't have to. SAS Marketing Automation fits your needs, whatever they are, from dynamic segmentation to design to execution - the entire span of capabilities, or just the pieces you need.

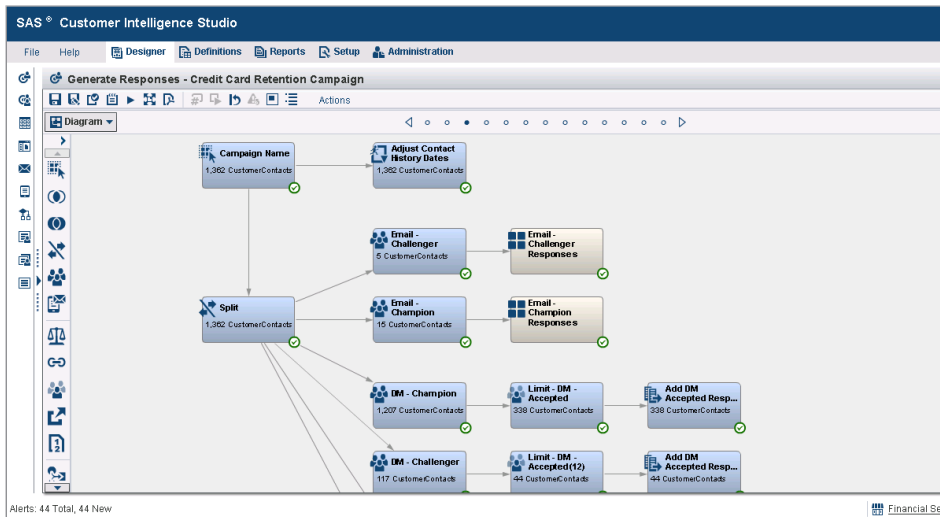
SAS has poured more than 10 years of research and development into the Marketing Automation offering. Over the years we've packed it full of all the best features, and removed the clutter of the ones that don't matter. And it's the only solution available that has both good looks (a sleek interface) and brains (powerful SAS Analytics).

### Designed to meet the needs of marketers

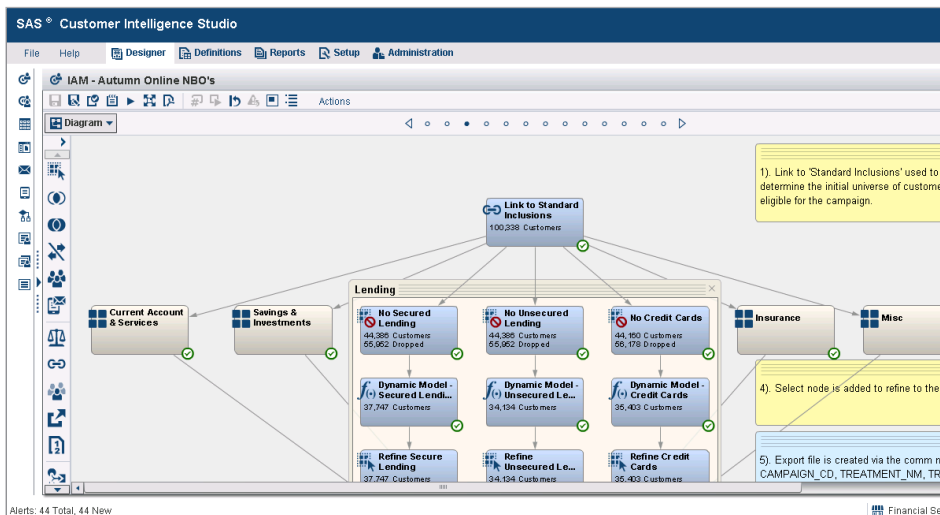
A browser-based interface offers best-in-class usability. That means easier campaign creation. Straightforward navigation. Intuitive search capabilities. Effortless information sharing. And easy reuse of treatments, campaign components and other marketing objects.

The easy-to-use interface lets you move through the campaign design process with greater speed and efficiency than ever before. In fact, marketers at all levels can easily define target segments, prioritize selection rules, select communication channels, schedule and execute campaigns, and analyze campaign performance. In addition:

- **Process-driven campaign flows** make it faster and easier to create campaigns while simultaneously managing hundreds of campaigns every day - from very simple email campaigns to complex, multistage, multichannel, mixed-media campaigns.
- **New navigation capabilities** offer a variety of methods for moving through campaign processes, based on individual preferences.
- **A portal-driven dashboard** serves as a single point of control for managing all marketing activities.
- **An integrated campaign checklist** outlines all tasks necessary to complete a campaign and includes an approval step to ensure proper sign-offs before campaigns are executed.
- **Built in BI.** A reporting workspace allows you to design and execute campaign performance reports without moving to separate BI or reporting software.
- **Full-screen design capabilities** let you enlarge and focus on one portion of a campaign instead of viewing the whole campaign at a smaller resolution.
- **The ability to share and reuse campaigns** and their related components and subcomponents eliminates duplication of effort and costly rework.



Quickly and easily set up outbound campaigns with a drag-and-drop interface. Apply analytics and detailed selection criteria to uncover the most insight and drive profitable revenue growth.



Campaign designers can easily navigate and manipulate campaigns for greater efficiency and effectiveness.

### Unmatched analytics for better insight, better targeting and better response

SAS Marketing Automation embeds analytics directly into campaign processes, so you get valuable insights throughout the process - based on data-driven information, not instinct.

Powerful, analytically based clustering, segmentation, modeling and optimization capabilities enable you to produce smarter, more targeted campaigns that yield higher response rates and better ROI. You can develop highly targeted customer segments based on purchase and response propensity, attrition potential, market basket analysis, profitability, credit scores and more. In addition:

- **Graphically driven selection tools** let you select the appropriate target audience for every campaign by making visual selections from charts – e.g., histograms that show trends – or more sophisticated selections based on variables in the customer data.
- **Priority optimization** automatically prioritizes which customers should receive which campaigns when you have multiple campaigns for a common customer base.
- **Multiple campaign testing methods** let you test campaigns and their components before they go out the door to ensure that you're targeting and contacting the right customers, every time. These methods include:
  - Out-of-the-box A/B testing.
  - Improved automatic holdout control groups.
  - Live seeds.

In addition, you can use the insight you get from analytics to set your campaign success criteria. For example, you can:

- Successfully acquire new customers by knowing which ones are primed for contact now.
- Know when a customer is about to leave so you can target that customer for retention.
- Know who your best customers are, and turn them into vocal brand advocates, by putting them in a growth segment and marketing to them aggressively.

## Key Features

### Usability

- User-friendly interface for campaign planning, design, execution and management.
- Graphical, data-driven segmentation capabilities.
- Multiselect capabilities for creating complex segments while reducing node clutter.
- Visual selection capabilities, including pick lists and histograms at any entity level (e.g., household, customer, account, business) within a campaign.
- Reusable campaign components – control groups, seeds, diagrams.
- Persona-based campaign workflow checklists.
- Persona-based designer workspaces, allowing different types of users access to only those sections of the solution they need.
- Detailed diagram documentation for enhanced usability and easier knowledge transfer/sharing.
- In-application administration capabilities that enable marketers to create business contexts and other administration artifacts that previously had to be created by IT.
- Both a design and process gallery for three user types – editor, viewer and approver.
- Consolidated treatment interface for viewing treatments or offers from a central location.
- Status and versioning capabilities for ensuring that the most up-to-date content is being used.
- Full-screen design capabilities, with easily accessible panning, zooming, selection and layout tools.
- Dynamic page flip technology.

### Unmatched Analytics

- Drag-and-drop clustering for advanced segmentation and analysis.
- Multiselect nodes for creating complex segments and decreasing diagram clutter.
- Visual selection of criteria using pick lists and histograms at any entity level (e.g., household, customer, account, business) within a campaign.
- Ability to register and execute predictive models, as well as import models, analyses and macros, with drag-and-drop ease.
- Custom tool creation for extending capabilities that support advanced analytical requirements and for addressing client-specific process, segmentation, profiling and testing requirements.
- Automatic selection of statistically significant sample sizes to ensure proper control of group sizing.
- A/B testing capabilities for introducing repeatable control groups for testing and measurement purposes.
- Tracking of analytical results in the common data model for reporting purposes.
- Ability to easily create custom analytical calculations – e.g., customer lifetime value, customer profitability, lift and ROI – from the interface.
- Ability to determine next-best product and perform market basket analysis to develop ideal product mixes.
- Direct integration with SAS® Enterprise Miner™, the industry standard for data mining and modeling.

### Superior Information Management

- Embedded data integration capabilities for addressing every aspect of managing customer data, from ETL to data quality.
- Direct access to customer data at the enterprise level.
- Ability to view business contexts and information maps to see data relationships and mapping, giving marketers insight into what data attributes are best to use in campaign selection.
- Ability to easily import data from other SAS applications or third-party applications to use in campaign selection and execution.
- Ability to view campaign response data and contact history data – allowing for easy campaign performance and effectiveness reporting.
- Industry-specific data models that assist customers in deploying enterprise-level marketing solutions.
- Multiple storage options, including support for star schemas, dynamic clustered tables and parallel loading into virtual tables.

## Superior information management - the right data where and when you need it

Quality customer data is essential to successful marketing campaigns. That's why SAS Marketing Automation helps you address every aspect of managing customer data, from extract, transform, load (ETL) to data quality, so you have access to enterprisewide customer data - from transactions, customer behavior, qualitative sources (e.g., surveys, focus groups) and external resources - when and where you need it.

Custom information mapping technology ensures that the data you need - from online social data, to offline channel data, and everywhere in between - is right at your fingertips. Because marketers assign the best data relationships, you'll get faster, more precise answers - after all, marketers are the ones who know the customer data best. Plus, there's no need to wait for IT to pull the data - and re-pull it when it's not quite right. In addition, SAS Marketing Automation provides:

- **Industry-specific, customizable data models**, so you can address your organization's individual needs.
- **Versatile storage options**, including support for star schemas, dynamic clustered tables, parallel loading into virtual tables, and integration with SAS Data Integration Studio.

Every channel you market through yields information about your customers. Don't waste that valuable insight. Instead, incorporate what you learn from channel marketing solutions, such as SAS Adaptive Customer Experience or SAS Social Media Analytics, directly into your campaign processes for a more holistic view of the customer.

## Key Features (continued)

### Custom Campaign Processes

- Ability to create custom nodes to address all client-specific processes.
- Ability to create custom subprocesses for segmentation, profiling and filtering requirements.
- Ability to customize testing processes to accommodate champion/challenger and challenger/challenger content objectives.
- Ability to perform common campaign techniques (householding, reporting, control groups, seeds, etc.) with ease.
- Direct integration with SAS Real-Time Decision Manager, the inbound component, under a single interface.
- Ability to group and optimize campaigns based on priority (business rules) or analytically derived (analytical algorithm) optimization methods.
- Direct integration with SAS Digital Marketing as the execution engine for email campaigns.

Because all SAS Customer Intelligence solutions use a common, open data model, you can incorporate information from adjoining SAS solutions as well as any third-party solutions. Bring in all the additional data, combine it with your campaign response data, and use the cumulative insight to continually refine your closed-loop marketing processes.

### Custom campaign processes

Why try to modify the way your marketing organization works to fit a hodgepodge of marketing tools? SAS Marketing Automation enables campaign designers to customize the entire campaign process to fit the business - not the other way around.

Do you have very complex campaign subprocesses or the need to integrate with third-party or legacy applications? No worries. SAS Marketing Automation makes it quick and easy to do so by allowing you to create custom processes based on your unique business requirements.

For example, drag and drop a custom node onto the workflow palette, then use the custom interface to quickly and easily select data attributes for the formula - it's that easy. Have a formula that's specific to just your business? No problem. You can implement it using the custom node functionality.

You can also customize the solution to extend to broader marketing objectives through integration with other SAS Customer Intelligence solutions, such as SAS Real-Time Decision Manager, SAS Marketing Optimization and SAS Digital Marketing. These solutions are all accessible via a single, user-friendly interface. That means that, rather than using SAS Marketing Automation in a silo, you'll be using it alongside other solutions spanning inbound marketing, optimization and execution.

To learn more about SAS Marketing Automation system requirements, download white papers, view screenshots and see other related material, please visit [sas.com/marketingautomation](http://sas.com/marketingautomation).

For information on configurations and system requirements, please contact your local SAS sales representative: [sas.com/offices](http://sas.com/offices)