



# CRM Automation

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# Agenda

- Customer Intelligence Strategy
- Marketing Automation Solution Description
  - Positioning
  - Components & Features
  - Competitive Differentiators
- Success Stories
- External Validation

## Marketers are telling us...

- They have difficulty understanding and managing customer life cycles and profitability
- They do not understand how well their marketing department is doing, and how to improve ROMI
- They have difficulty designing, delivering and tracking sophisticated, event driven marketing communications, in the timeframes required by the business
- They have difficulty in coordinating outbound campaigns with inbound customer interactions
- They suffer from a lack of integrated support for business people that are involved in the marketing process

# Challenges

- Create customer and prospect profiles
- Identify the most profitable customers
- Discover and plan how to communicate with customers
- Optimize multi-channel campaigns
- Anticipate and drive customer needs
- Retain the right customers and get more of them

# Marketing Organizations

“How to effectively link marketing operations with the chosen marketing strategy?”



# Great Marketing Organizations

**Create** customer intelligence

**Apply** it to the business

**Measure** the value



# Helps to Identify and resolve Business Challenges including:

**Customer Profitability**

**Lifetime Value**

**Segmentation Management**

**Customer Acquisition Programs**

**Customer Loyalty / Retention Programs**

**Marketing Effectiveness Measurement**

**Product Development**

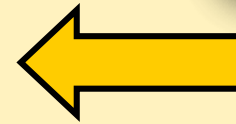
**Credit Risk**

**Fraud Analysis**

**Collection**

**Debt Management**

**Revenue Assurance**



# Solutions which help to resolve operational marketing issues such as:

**Channel Strategy & Management**

**Call Centre Management**

**Marketing Budget Optimisation**

**Contact Management**

**Conflict Management**

**Marketing Program Reporting**

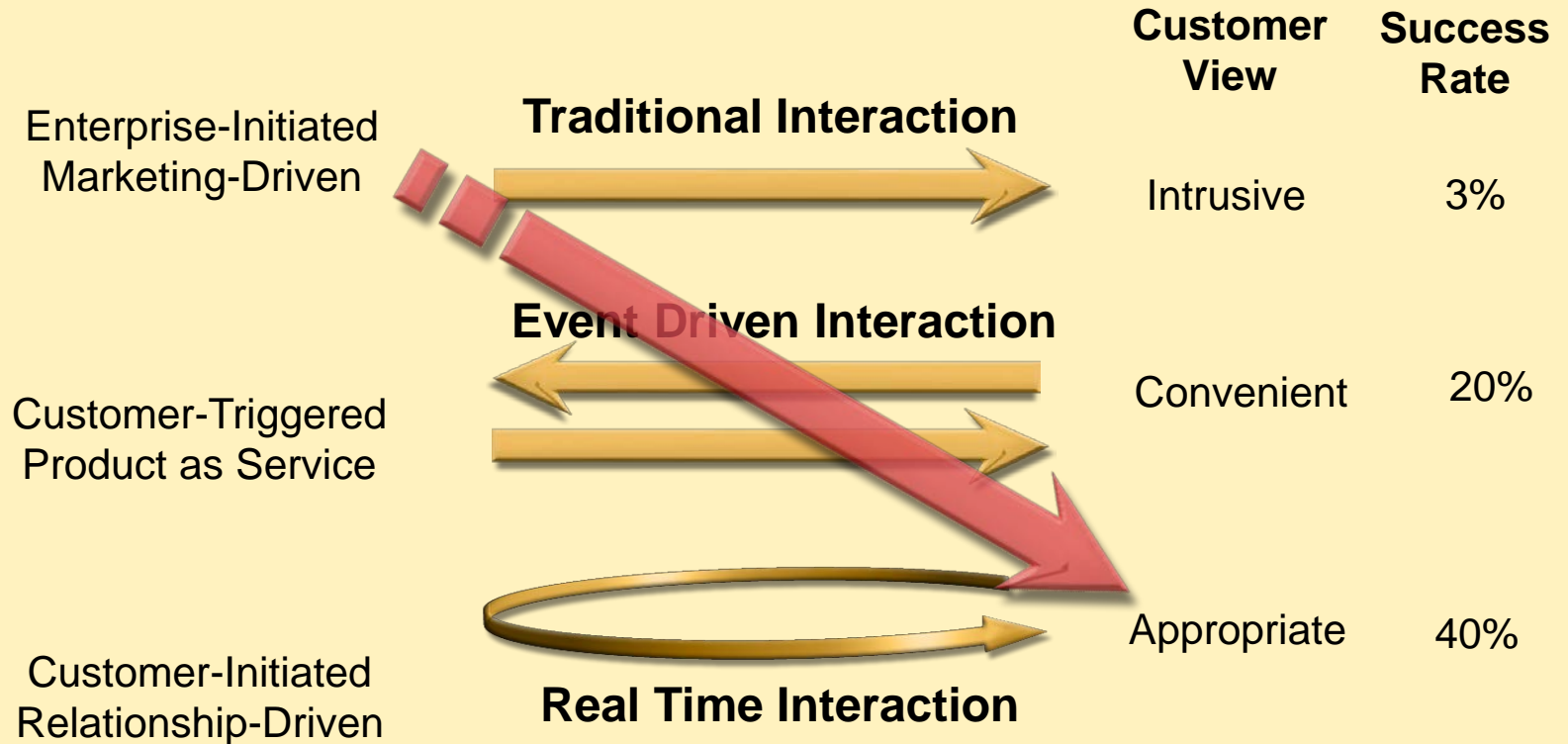
**Real Time Messaging**

**Response Analysis**

**Web Data Analysis**



# Customer Intelligence in Action



Gartner Group, 2003

# Customer Intelligence Landscape



# What is Customer Intelligence

## *Customer Intelligence in Action*

### **Action Based**

- Interact at the RIGHT time
- Interact with the customer through the RIGHT channel
- Exploit opportunities
- Channel & Budget Management

### **Superior Insight**

- Quality of intelligence
- Domain expertise
- Continuously updating
- Aligns with company strategy
- Role based analytics

# Customer Intelligence Strategy



# SAS<sup>®</sup> Marketing Automation

Helps organizations generate customer intelligence and drive personalized customer communications to

- meet critical business objectives
- increase campaign returns
- maximize customer profitability

# SAS Marketing Automation

Gives you the vision for success via:

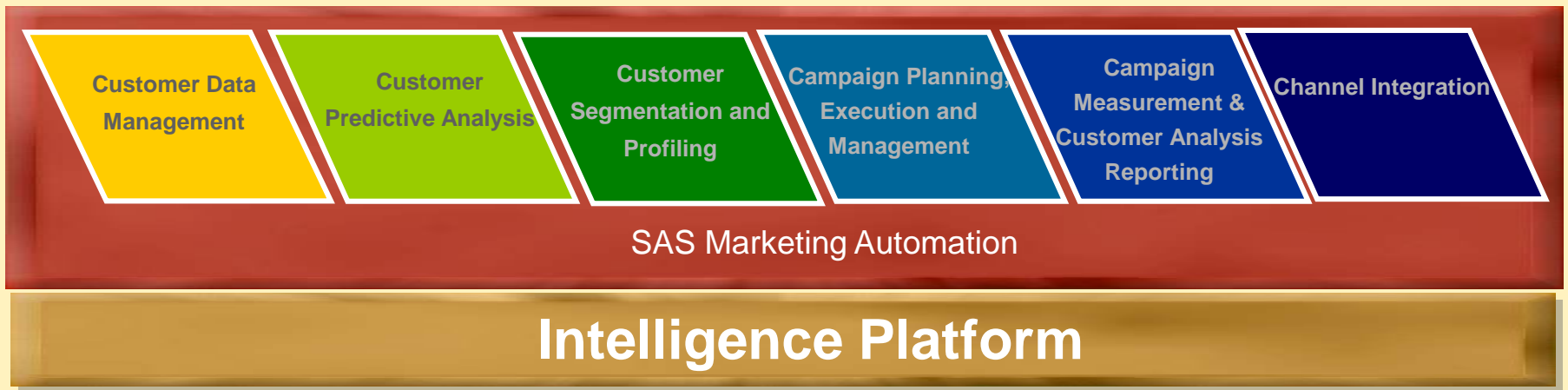
- Driving marketing initiatives through a disciplined **business process**
- **Empowering marketers** to deal with increasing amounts of data to generate and deploy actionable customer intelligence
- **Improving experience for every user** who contributes to success of marketing automation
- Providing **enterprise level infrastructure** through the most comprehensive business intelligence platform
- Offering broad **extensibility** through integration to other SAS solutions to provide even more sophisticated and strategic marketing solution.

# A Closer Look at SAS Marketing Automation

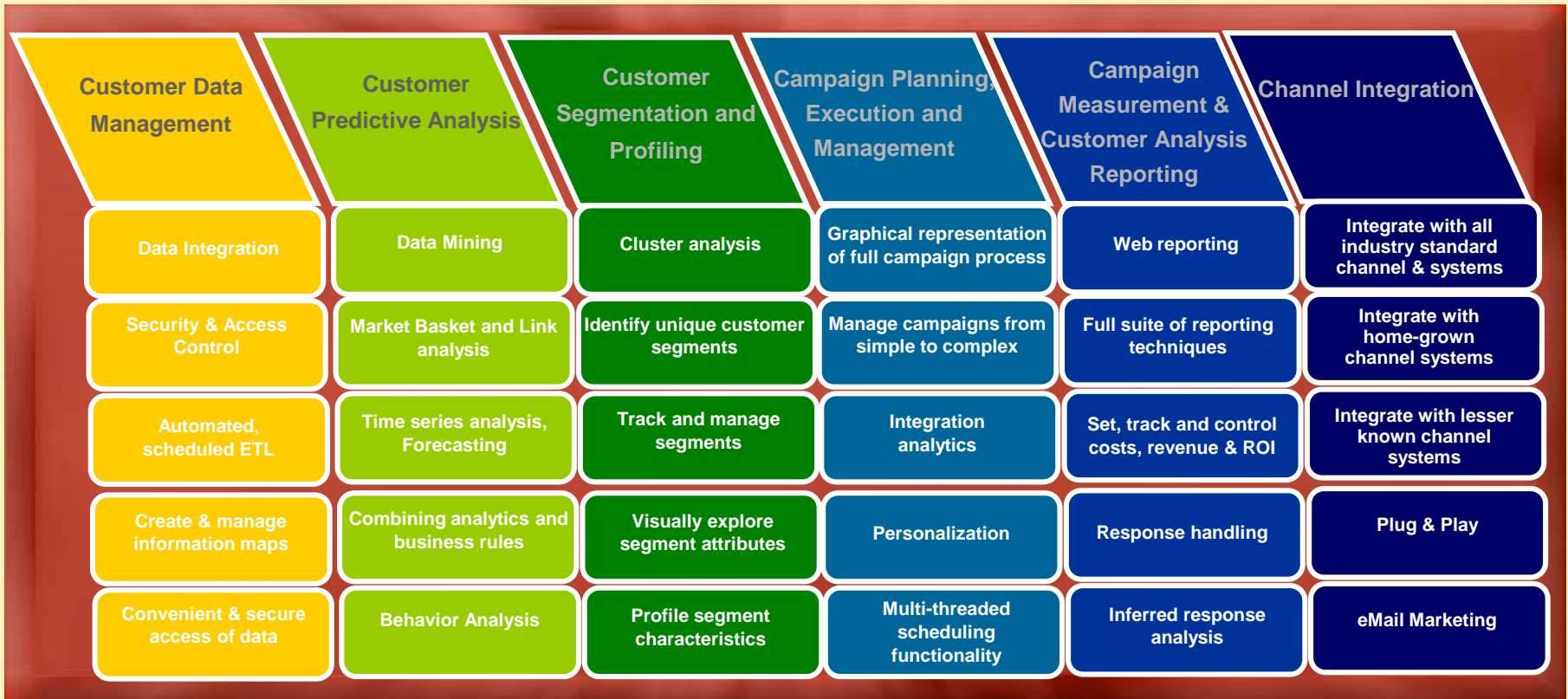
## Solution Components and Features

# SAS Marketing Automation

## Comprehensive Marketing Functionalities



# Comprehensive Marketing Functionalities of SAS Marketing Automation



# SAS Marketing Automation Differentiators

## - *Marketing Perspective*

- Usability, Functionality and Completeness of the solution
- Targeted analytics
  - Understand past behavior and predict future behavior
- Delivery of all size and scale of marketing campaigns
  - Simple to robust (multi-stage, -channel and event driven)
- Extensibility

# SAS Marketing Automation Differentiators

## - *IT Perspective*

- Data management superiority
  - ETL & information mapping via global metadata approach
  - Broad platform support
- Open standards-based integration with channels
- Security model integrated across platform set

# SAS Marketing Automation Differentiators

## - *Company Perspective*

- Corporate Strength and Stability
- Global Reach



27 years



# SAS Marketing Automation Customer Demographics

## Industry

- Banking
- Financial Services
- Insurance
- Retail
- Telecommunications
- Utility
- Entertainment
- CPG
- Automotive

## Geography



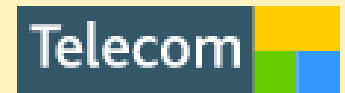
# Sample of SAS Marketing Automation Customers



# More SAS Marketing Automation Customers



First National Bank



# Consistent Leadership in CRM



## CRM Magazine Awards:

(August 2003)

1. CRM Market Leader Award
2. President and CEO Dr. Jim Goodnight won the Influential Leaders Award for CRM industry
3. SAS and its customer LexisNexis won 2003 CRM Elite award.



SAS Marketing Automation solution won Datamation's "Product of the Year" award. (May, 2003)



CUSTOMER INTER@CTION Solutions® Magazine's CRM Excellence Awards for fourth consecutive year ! (August 2003)

# More Customer Successes

**Morgan Stanley**

Financial Services US

- Business Pain: Find and nurture the most profitable customers.
- SAS Solution: Morgan Stanley uses SAS products to profile each customer, increasing benefits to the most profitable while cutting marketing costs.
- ROI: 40 percent increase in the number of accounts opened compared to the same period the previous year.

# More Customer Successes



Retail Germany

- Business Pain: Needed a solution to analyze customer information from seven million loyalty cards.
- SAS Solution: SAS Marketing Automation delivers better customer relationships through automated and highly targeted marketing campaigns.
- ROI: "The response rate to our mailing campaigns to reactivate customers is three to four times higher today than in comparable past campaigns."

# More Customer Successes



Financial Services

US

- **Business Pain:** Efficiently market products and services to retail and commercial banking customers. To promote more dialogue with customers and put out more targeted marketing campaign with fewer staff and resources than many of their competitors
- **SAS Solution:** SAS Marketing Automation Solution helps providence gain deeper understanding of their customers and increase response rates
  - Analyze current customer behavior relative to past behavior.
  - Recognize and react to probable account attrition.
  - Identify and acquire new clients.
  - Understand client deposit behaviors.
- **ROI:** Improved response rate by 400%



*The Power to Know<sup>®</sup>*