

Service: EDS Industry: Finance Engagement: Product Selection, Analysis & Design

Amentra Implements Large Scale Campaign Management Platform

REDUCED CAMPAIGN CYCLE TIME FROM MONTHS TO WEEKS & REDUCED ERRORS FOR LARGE FINANCIAL SERVICES COMPANY

AFTER AMENTRA

- Unica's Affinium campaign management software and the Teradata data warehouse platform were combined to create a massively scalable campaign management platform
- A standardized integration strategy now exists for interfacing with downstream fulfillment systems
- Offer history information is now centralized and stored within the Teradata warehouse
- Improved security and controls reduces the chance of self dealing and improves auditability
- Improved accuracy, shorter cycle times, reduced errors

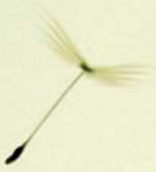
BEFORE AMENTRA

Amentra partnered with a major financial institute to architect and implement an enterprise-wide campaign management platform for the development and execution of proactive marketing campaigns. Prior to implementation, campaigns were developed and executed manually. There were no standard campaign management tools or platforms and campaigns were developed with ad hoc tools, including spreadsheets, SQL files, and user tables. Analysts ran custom SQL scripts, stored procedures, and SAS models to identify target accounts. There were few common processes across business lines and the processes that were followed lacked sufficient controls (auditing, security, monitoring), provided no centralized information store for offers made to customers and were generally inefficient.

EVOLUTION OF THE INFRASTRUCTURE

Amentra helped solve several critical business challenges.

- **No common campaign management tools or platform –**
Different processes and data were used across the company. Amentra worked on the architecture for the new campaign management platform, was part of the vendor selection process, provided valuable insight for new business processes, and also played a major role in the technical implementation.
- **Long cycle times for campaign development –**
Amentra worked with the company to define streamlined development and execution processes. The campaign management platform was rolled out throughout the company. The new platform provides a GUI interface that allows analysts to visually develop campaigns and provides a wealth of features for performing exclusions, segmentation, and offer assignment.



TECHNOLOGY USED

- Campaign Management: Unica Affinium Campaign 4.6.x, 6.x
- Platform: Sun Solaris 8.x, HP HPUX 11
- Middleware: BEA Weblogic
- Database: Teradata v5r2, Microsoft SQL Server
- ETL: Ab Initio

- **Insufficient validation and controls –**

Analysts were too close to data that was sent directly to various production systems. Amentra architected security mechanisms and an integration strategy to isolate production systems from analysts.

- **No centralized interface mechanism to downstream systems –**

The final architecture specified standard interfaces and a reliable integration strategy.

Key results include the following:

- Reduced Campaign Cycle Time from Months to Weeks
- Increase in the number of Campaigns, More Frequent Runs
- Improved Quality, Reduced Errors
- Standardized Integration Strategy
- Central Offer History Information
- Improved Security & Controls
- Common Campaign Management Platform

APPLIED TECHNOLOGIES AND EXPERTISE

Amentra was originally brought in to architect the system and our project team quickly got involved in other aspects of the project. The following highlights our areas of involvement:

- Campaign Management RFP Development
- Vendor Analysis & Selection
- System Technical Requirements
- Functional Requirements Review
- System Architecture
 - Integration Strategy
 - Platform Selection
 - Performance Testing
 - Security Architecture
 - Database design
 - Development and QA environments
- System Design
- System Operating Procedures
- System Implementation

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