

## Kalido® Campaign Management

### **Better Data Fuels Better Banking Campaign Management & Marketing Analytics**

The ability to acquire new customers, and cross-sell and upsell products to existing customers, is entirely dependent on how well you know your customer. How will you create a comprehensive customer view to personalize interactions, and analyze the results of your marketing campaigns?

#### **The Customer Data Imperative**

As with any consumer-facing industry, banks face challenges in acquiring and retaining customers. In today's digital, always-on world, knowing and reaching those customers is much easier than in days past. Because of this, customers expect that any person from the bank who contacts them should have all the relevant customer information at hand – who they are, what products they have, what other products they might be interested in, and their contact preferences.

Sadly, this is not always the case.

Customer data is often stored in a multiple disconnected applications and repositories. The mortgage team may not know that a customer holds a bank-issued credit card, or the checking & savings team don't know about the home equity loan. As a result, your ability to cross-sell and upsell is severely limited or impossible.

With poor customer data, marketing campaigns may target the wrong customers, communications won't be personalized, campaigns may be delivered through the wrong channels, and banks may be unable to create a dialogue that is relevant, and doesn't match customer preferences. As a result, campaign responses are poor, money and resources are wasted, and customer satisfaction and confidence in the bank is eroded.

The cure is to ensure your campaign management tools are fed with consistent and accurate customer data so your campaign management team can create timely, relevant messages and offers in a personalized dialogue with customers.

### **Rapidly Deliver Consistent Customer Data & Campaign Analytics**

With complete and accurate data, you can gain the insight you need to interact with customers on a personalized and relevant basis. These interactions will generate additional data, which you must then analyze, and feed into subsequent interactions to create a dialogue, enabling you to generate next best offers.

The Kalido Information Engine offers capabilities to build a comprehensive customer view to feed your campaign management tools, and delivers an agile and automated foundation for campaign analytics that integrates data from all relevant sources. Kalido further automates building the semantic layer behind popular BI tools used to deliver reports and analytics.

#### **Master Data Management**

Our Kalido MDM component enables you to match records for all types of data – customer, product, location, and more – coming from multiple operational sources, into a single repository to create a golden copy of customer data to feed your campaign management tools, as well as other systems. Our business-model-driven approach enables you to accommodate important information to enable you to better categorize your customers, such as what product they use, their contact preferences, demographic information, and more. Additionally, Kalido MDM enables a stewardship and governance process to handle exceptions when matching records between data sources, and a remediation, approval and authorization process, with a complete audit trail and view of historical values, to deliver consistent and accurate information.

## Data Warehouse Automation

The Kalido Information Engine automates the design, build and ongoing operation of an agile data warehouse. It is driven by a business information model which affords the ultimate in flexibility to collaboratively specify the requirements for the warehouse with input from the business consumers. The business model makes the warehouse easy to change in response to changing business requirements. Kalido's automation extends to the data integration steps to bring in campaign results data, integrate it with other relevant data, and deliver it to BI tools for campaign analysis.

## How Does a Kalido Solution Enable Banks to Perform?

**Enables cross-selling.** A regional bank wanted to centralize all information to create a 360 degree view of operations and improve internal and regulatory reporting. They also wanted alignment of house-holding information and product sales data to better characterize buying patterns and tailor cross-sell packages and promotions. Kalido accelerated and automated data integration and provided a foundation for analytics, which is used by the bank's marketing team to better predict patterns and deliver timely and more precisely targeted promotions.

## Integration of distributed information to improve insights.

A large regional bank had limited ability to analyze customers, operations, or the performance of products or branches. Data from the various functions within the business could not be viewed holistically so planning was difficult. With shrinking customer profitability and concerns about customer acquisition and retention, the Bank utilized Kalido to create a common model for integration of various data to improve insights that business planners use to optimize profitability by identifying and retaining potential high value customers.

**Identifying profitability drivers.** A large multinational bank wanted to more effectively determine channel, customer and product profitability, delivering a rich set of banking products and services that leads to customer satisfaction, retention and a broader banking relationship. The bank selected Kalido as the technology on which to build the integrated view of its business and as the foundation for its financial analytics. Integrating information from its various transaction and interaction points into a holistic view of the bank's clients and then applying analytics to that view will provide a highly detailed picture of customers, services usage and channel preferences.

## Why Kalido by Magnitude Software?

Magnitude Software is an enterprise information management software company whose products have enabled organizations worldwide to solve their most vexing business information problems. Our Kalido brand technology is the only data warehouse automation and master data management software created by, used by and proven by a multinational corporation to solve its own highly complex business information problems.

For more than a decade, Kalido brand software has enabled data warehousing and MDM programs to support companies from midsize businesses to Fortune 100 multi-national corporations. Business planners use the fully integrated information to radically sharpen insights with a complete view of the business. Financial executives rely on Kalido to provide timely, consolidated and fully auditable information for regulatory reporting. With Kalido the value comes fast, is delivered by a small team and does not require extensive use of additional integration tools that drive hidden costs into other approaches.

For more information please visit <http://www.kalido.com>

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