A Retail Software Company Orchestrates Integrated Customers' Campaign with Data-Centric Design

The data-centric orchestration of CRM, ERP and devices produces a consistent customer experience management and improves significantly the marketing campaigns conversion rate.

The situation

With its traditional systems' architecture, the customer experience in this company was scattered among the digital channels, both web and mobile. It encompassed the acquisition process the licence renewals interactions and the devices maintenance activities. All these different dimensions were extremely difficult to manage with a traditional campaign management solution. Tackling this issue was key to maintain the commercial reach of Panda, an antivirus software vendor based out of Spain.
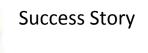
The software vendor chose Balandra to handle the inbound flow of the different data sources in order to produce a consistent and compelling set of messages, fully personalised to each customer taking into account his products portfolio, his devices status as well as the real experience of this customer with each of them.

The solution

The retail software vendor was already using a standard CRM tool to maintain the customers' basic data. The company's ERP was already in production with all the products information and renewal data. Finally, the protected devices could report to the company their actual status and events. The devices were also able to display personalised messages as an additional channel for customer engagement.

The challenge resided in the proper articulation of those three data flows (CRM, ERP & devices) to personalise sharply each of the outgoing marketing campaigns through leveraging the knowledge of the actual events on the devices, and thus obtaining a much better conversion rate. After some time, the company concluded that the traditional approach to design customers' campaigns and handle the different steps as a static sequence had reached its limits. The company conducted an exhaustive research and selection process, and came to the conclusion that the data-centric modelling methodology that Balandra is using would provide a real breakthrough in cross-channel customer engagement. The company acknowledged that Balandra's approach fully addresses the challenges that traditional solutions are facing to orchestrate diverse data sources to ensure a consistent and compelling "Brand Behaviour".

 Balandra was placed as the linking pin between the customer data and the licenced devices. The sequence of hits planned in each campaign was defined in Balandra so that both the final eligibility of

any given customer and the actual messages sent out on mail or on the target devices were decided in Balandra and sent out through the messages gateways.

As Balandra was integrated as a middle man, the integration itself was achieved mostly reusing existing features of the legacy architecture. The new component go-live went unnoticed from the traditional systems and the data quality improvement to reach the maximum potential of the architecture was an incremental effort.

The result

The project with Balandra successfully matched all the goals set by the retail company: the complexity of the behaviours handled by Balandra did not affect the system in place neither its time-to-market nor operating costs. Balandra successfully manages the actual customer campaigns, fully personalised, and driven from the business through the business rules management system (IBM/ODM), embedded in Balandra. The flexibility of the resulting system comes from this orchestration of simple components: any new campaign takes only a few hours to be ready for testing and most of the deployments are a warm deployment of rules.

The experience was key to understand the real customer experience information, coming from all the systems. The resulting data-centric design, run in Balandra, could be replicated to optimise as well the multichannel customer engagement, aiming at the optimisation of the multichannel acquisition and renewal, in order to lower the acquisition and the service costs.

How the retail company and the Balandra team worked together

Balandra's team worked with the business areas of the client to express the requirements during a discovery phase. After that, the process was formalized according to Kopernik, the data-centric modelling methodology that we use and which is owned jointly by Balandra and the Universidad Politècnica de Catalunya.

The technical team integrated Balandra with the existing interfaces. They were also in charge of the transcription of the formalized model into Balandra. Once live, the platform was provided "as-a-Service".

About Panda (www.PandaSecurity.com)
Panda Security SL, formerly Panda Software, is a Spanish computer security company founded in 1990 in Bilbao (Spain). Initially centered on the production of antivirus software, the company has expanded its line of applications to include firewall applications, spam and spyware detection applications, cybercrime prevention technology, and other system management and security tools for businesses and home users. Panda Security competes in the antivirus industry against Avast!, Avira, Bitdefender, ESET, F-Secure, Kaspersky, McAfee, Sophos and Symantec among others.

About Balandra
With its recognition as a Gartner Cool Vendor in 2015, and its team with 20+ years of direct customer experience, Balandra is the world leading supplier of data-centric process design and technology. Together with its clients, Balandra delivers business value through its technology solutions that are a perfect fit for the new needs of the digital company.

Learn more about us at www.balandrasw.com