



From Manual to Modern — Transforming Regulated Outreach with SAS Direct



Enabled near real-time
campaign delivery across
multiple regions



Expanded digital reach
through automated SMS
and email deployment



Empowered internal teams
with full independence
post-launch



Client

Our client is a leading financial services organization operating in a highly regulated environment. With a mission to engage customers respectfully and effectively, the client's outreach model depends on delivering compliant, personalized messages at the right time through the right channels. Historically reliant on outbound call centers, they sought to modernize their campaign execution to reduce operational overhead and increase the effectiveness of digital channels like email and SMS.

Challenges

Before working with Munvo, the client's campaign processes were highly manual and rigid, relying heavily on SQL-driven logic with limited automation or scalability. Their communications were predominantly phone-based, with little ability to send compliant digital follow-ups or reminders. This lack of flexibility introduced several challenges:

- **Operational Bottlenecks:** Campaigns could only be executed once daily, making it difficult to scale or react quickly to business needs.
- **Regulatory Constraints:** Compliance requirements made it difficult to automate follow-ups, manage frequency, or segment audiences dynamically.
- **Over-Reliance on Call Centers:** Without strong digital infrastructure, engagement relied on resource-intensive outbound calls, limiting reach and driving up costs.
- **Limited Segmentation and Scheduling Options:** The client was unable to tailor delivery by region or time of day, impacting engagement effectiveness.

The organization needed a solution that would enable compliant digital engagement at scale while reducing manual workloads and reliance on legacy systems.



Solution

Munvo led a multi-phase modernization initiative to transform the client's campaign execution process through SAS Direct. Our work focused on both the technical and strategic layers to ensure a scalable, compliant, and agile campaign management solution:

- **Platform Migration:** Transitioned all campaign operations to **SAS Direct**, enabling better integration and orchestration of digital communications.
- **Modular Campaign Design:** Restructured and simplified legacy campaign logic into manageable, flexible components to support real-time workflows.
- **Real-Time QC Process:** Introduced robust quality control steps to enforce regulatory compliance during every step of campaign deployment.
- **Advanced Delivery Logic:** Enabled time-of-day and follow-the-sun delivery strategies, supporting regional targeting and customer time zone alignment.
- **Internal Enablement:** Delivered hands-on enablement, documentation, and training to ensure that marketing and administrative teams could operate independently after go-live.

Benefits *The transformation delivered immediate and long-term value for the client.*



Agility & Flexibility: Campaigns can now be launched and updated quickly, with flexible delivery schedules and dynamic audience segmentation.



Increased Digital Engagement: Automated, compliant deployments across email and SMS have expanded the client's reach while reducing dependence on outbound calling.



Operational Efficiency: Automated reminders, frequency checks, and time-based logic reduced the need for constant monitoring and manual execution.



Internal Ownership: Post-launch, the marketing and admin teams are fully capable of managing campaigns without relying on external support, improving speed and reducing costs.



Results

- ✓ Enabled campaign delivery by time of day and region across multiple markets
- ✓ Reduced execution delays by moving from once-per-day to near real-time delivery
- ✓ Automated compliant SMS and email communications, expanding digital reach
- ✓ Eliminated call center dependence for follow-ups, improving cost-efficiency
- ✓ Empowered internal teams to independently run and monitor campaigns
- ✓ Paved the way for future expansion into SAS CI360 Discover for web campaign insights



This project reflects the kind of transformation that's possible when strategy, technology, and regulatory needs are aligned. The client team was highly engaged, and their quick adoption of Direct enabled real business value in a short time'

— **Shaun Memon, Delivery Lead, Munvo**



The team really appreciated the strong communication, responsiveness to requirements, speed of delivery, and the partnership approach. Munvo was attentive to our needs and effective in problem-solving.

— **Executive Leadership, Client**



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