Modernizing Customer Engagement and Digital Journey Analytics Using SAS CI 360 Engage Direct and Discover

Compliant, repeatable batch campaign execution across channels with SAS CI 360 Engage Direct

Centralized segmentation improving control of high-volume outbound programs

Granular insight into payment portal journeys, drop-off points, and customer preferences with SAS CI 360 Discover

Faster delivery through close collaboration between client teams and Munvo SAS CI 360 experts
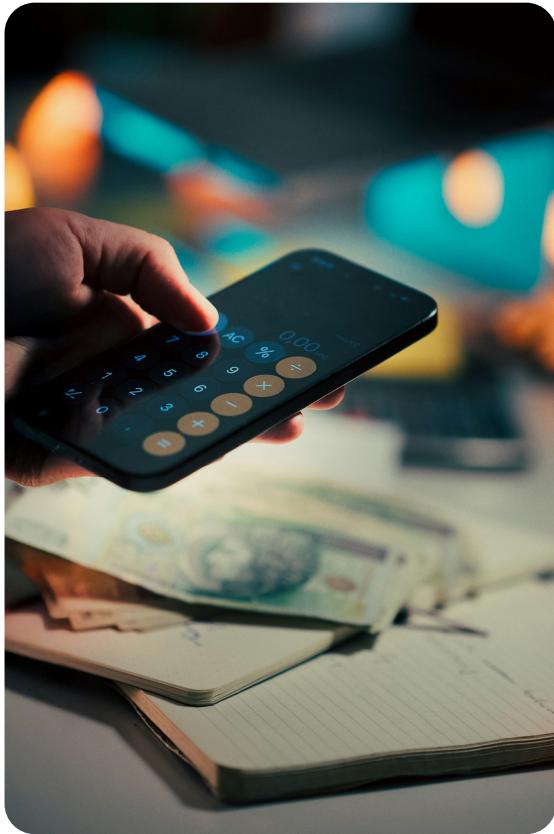
Client

The client is a large, industry-leading organization in debt recovery, operating in a highly regulated environment where data precision is critical to maintaining compliance and customer trust. At their scale, marketing operations must deliver absolute stability while managing millions of customer interactions across email, SMS, and physical letters. Every communication must align with regulatory constraints, customer eligibility rules, and operational dependencies, making execution discipline non-negotiable.

Digital journeys are equally important. Accurate tracking of payment flows and authenticated login experiences is essential to reduce friction, increase self-service completion, and improve recovery outcomes. Leadership required clearer visibility into how customers navigate the payment portal, where they drop off, and which payment options or plans they prefer.

Before modernization, the client operated in a complex landscape where digital touchpoints required tighter alignment with on-premises customer and engagement records. Advancing digital maturity required a more unified view of customer behavior so outbound communications and web interactions could be measured consistently and improved through insight-driven decisions.

Challenges

The client set out to enhance, modernize, and streamline customer communications by implementing SAS Customer Intelligence 360, with a need to strengthen both execution and measurement.

Marketing leaders needed clearer visibility into customer interactions across the website and stronger insight into how campaigns drive conversions and lift, including the ability to pinpoint drop-off points in the conversion funnel. This required a reliable web analytics foundation, aligned KPIs, and disciplined tracking practices that met cookie and tracking compliance expectations.

On the execution side, the organization needed a more structured operating model for outbound communications. They required a scalable approach to building audiences, targeting communications, and managing controlled testing without overloading internal teams already balancing ongoing operational demands.

Munvo was engaged as an experienced SAS CI 360 partner to provide structured delivery, embedded support, and practical enablement, enabling the client to move from legacy processes toward a modern, insight-driven marketing technology framework.

Munvo Solution

Munvo delivered two connected initiatives—SAS CI 360 Engage Direct and SAS CI 360 Discover—to improve marketing operations maturity across execution and measurement. The engagement emphasized embedded partnership, clear governance, and sustainable handover so the client could operate confidently after go-live.

SAS CI 360 Engage Direct — strengthening outbound execution discipline

Munvo helped operationalize Engage Direct to support on-premises direct marketing tasks and scalable audience operations across outbound channels. The work focused on repeatability, governance, and measurable testing.

Key solution pillars included:

- **Audience and segmentation operating model**
  Reusable segment structures enabled consistent eligibility and targeting logic across tasks and channels.

- **Message and task standardization**
  A structured approach to creating and managing messages and direct marketing tasks across email, letter, and SMS reduced process variability and improved operational control.

- **Controlled testing practices**
  Holdout control groups were enabled within tasks to support structured test-and-control approaches for measurement and optimization.

- **Delivery governance and enablement**
  Munvo provided test planning, UAT support, documentation, and coaching to ensure internal teams could run and evolve campaigns reliably.data warehouse, demonstrating a path to reduce data duplication and eliminate unnecessary infrastructure.

360

SAS CI 360 Discover — enabling digital journey insight and conversion intelligence

Munvo implemented SAS CI 360 Discover to establish a foundation for tracking customer behavior, journeys, and conversion metrics across the website, balancing business objectives with enterprise security and compliance requirements.

Key solution pillars included:

- **Use case alignment and KPI definition**
  Requirements and design workshops aligned analytics use cases, KPIs, and success criteria with business stakeholders.

- **Web tracking and journey visibility foundation**
  Website tagging and validation enabled reliable capture of page views, clicks, form interactions, and journey behaviors.

- **Identity-aware measurement**
  Identity events were configured to connect customer sessions across web interactions, improving segment-level analysis and journey interpretation.

- **Campaign and channel effectiveness measurement**
  Configuration enabled consistent evaluation of traffic sources and campaign contribution.

- **Reporting readiness and data access**
  Out-of-the-box Insights reporting was enabled, along with access to Unified Data Model data for broader performance monitoring.

- **Two-environment delivery and validation**
  Non-production and production environments were implemented and validated to reduce risk and confirm data capture accuracy prior to rollout.

Across both initiatives, Munvo supported internal stakeholders with clear project governance, structured validation, and practical enablement, helping the client build a scalable marketing
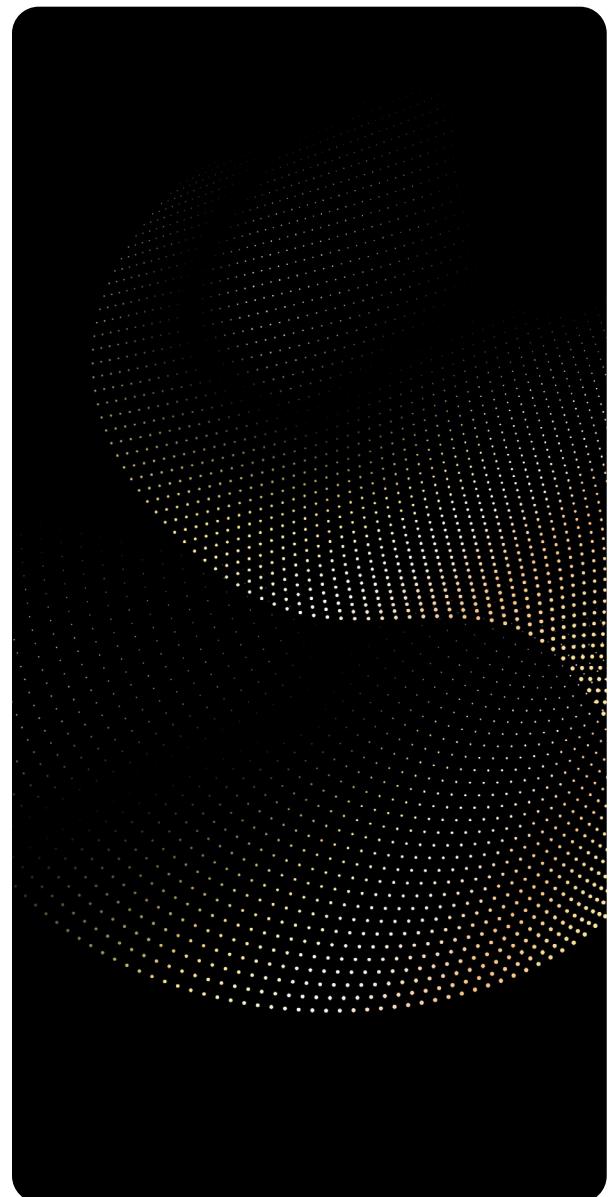
Benefits

The engagement strengthened both execution and measurement, enabling the client to operate with greater discipline, visibility, and confidence in a highly regulated environment.

- **Execution Discipline**: Standardized segmentation, targeting, and controlled testing enabled consistent, compliant batch campaign execution across channels.

- **Audience Control**: Centralized audience orchestration improved operational control for high-volume outbound programs.

- **Journey Visibility**: Granular digital journey signals enabled clearer understanding of payment portal behavior, drop-off points, and customer preferences.

- **Measurement Confidence**: Stronger measurement discipline across campaigns and channels supported more confident performance evaluation.

- **Operational Sustainability**: Structured governance, environment-based validation, and knowledge transfer reduced delivery risk and increased internal capability.

🏆 Results

- ✅ Enabled compliant, repeatable batch campaign execution using SAS CI 360 Engage Direct across email, SMS, and letter channels

- ✅ Established reusable audience structures and controlled testing practices to support scalable outbound operations

- ✅ Implemented SAS CI 360 Discover to capture and analyze digital journeys across the payment portal and authenticated login experiences

- ✅ Delivered automated web analytics across a footprint sized for approximately **3 million sessions annually**, improving visibility into customer behavior and conversion paths

- ✅ Advanced the client's MarTech Transformation Roadmap by integrating outbound engagement execution with digital journey intelligence

> Our biggest win was watching the client's teams move from working around constraints to operating with confidence. With SAS CI 360 Engage Direct, they gained a disciplined way to run complex, regulated batch communications. With SAS CI 360 Discover, they gained clearer visibility into how customers navigate the payments portal and where friction impacts completion. The partnership mattered—strong client leadership paired with Munvo's CI 360 expertise.

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