SmartMessage

SmartMessage Autoflow

Event Based Marketing & Stream Analytics

PRODUCT OVERVIEW
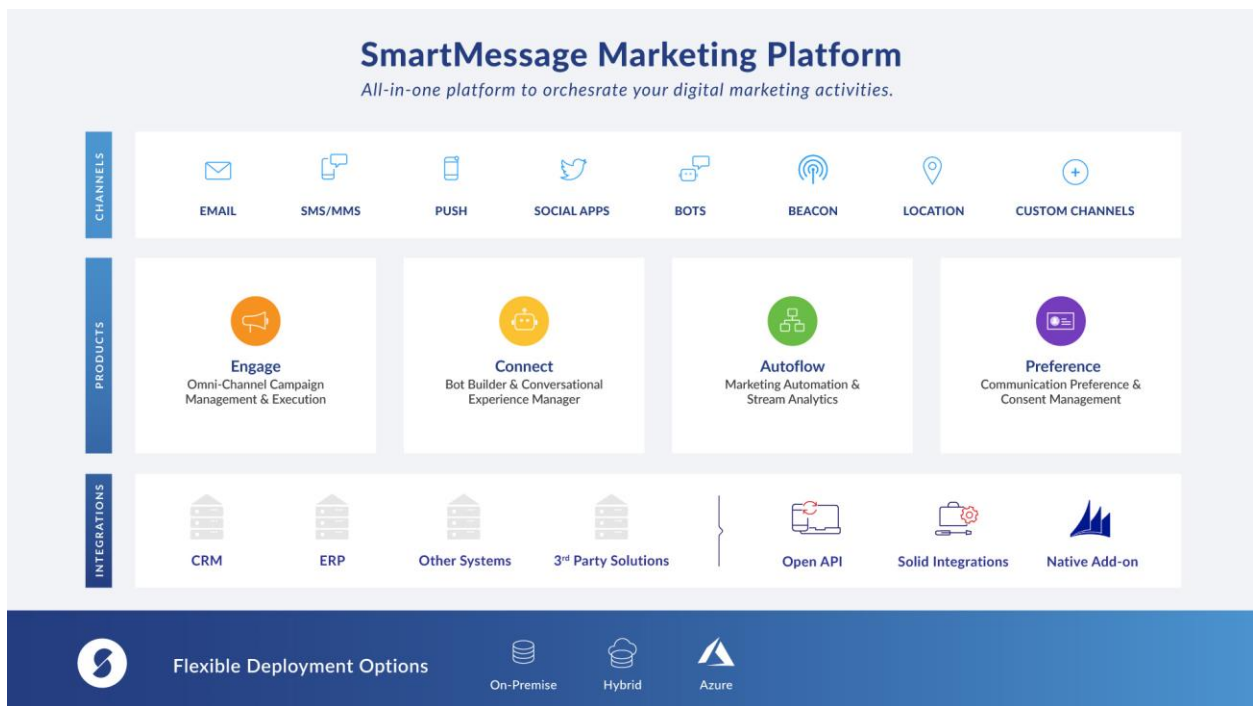
smartmessage.com

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1. SMARTMESSAGE MARKETING PLATFORM

With SmartMessage's omnichannel campaign management solutions and real-time event processing capabilities, management of all campaign interactions across inbound and outbound channels are consolidated in a single platform. You can create, execute, optimize, and evaluate all customer interaction strategies and run automated campaigns and event-driven programs.

Our products and solutions can be deployed rapidly, customized easily and integrated with any third-party applications. Our user-friendly interface and our extensive API allow you to manage, report and integrate campaigns at all scales.

SmartMessage Marketing Platform

All-in-one platform to orchestrate your digital marketing activities.

CHANNELS: EMAIL, SMS/MMS, PUSH, SOCIAL APPS, BOTS, BEACON, LOCATION, CUSTOM CHANNELS

PRODUCTS:
- **Engage** — Omni-Channel Campaign Management & Execution
- **Connect** — Bot Builder & Conversational Experience Manager
- **Autoflow** — Marketing Automation & Stream Analytics
- **Preference** — Communication Preference & Consent Management

INTEGRATIONS: CRM, ERP, Other Systems, 3rd Party Solutions, Open API, Solid Integrations, Native Add-on

Flexible Deployment Options — On-Premise, Hybrid, Azure

2. SMARTMESSAGE AUTOFLOW

SmartMessage AutoFlow supports triggered and event-based automation programs based on both external and internal events. This allows marketers to build multi-stage, real-time and event-triggered programs via a drag-and-drop workflow tool. With AutoFlow marketers can develop and launch automated and personalized cross-channel *(Email, SMS, MMS, Social Ads, Chatbot)* programs designed to deliver engaging messages when customers and prospects are most receptive and through their preferred channels.

2.1. Key Benefits

CROSS-CHANNEL MARKETING ORCHESTRATION USING YOUR ENTERPRISE DATA

Access your marketing data wherever it is located. Increase your marketing effectiveness and improve customer targeting based on offline behavior from your operational and marketing data sources as well as real-time online behavior.

CUSTOMER JOURNEY MANAGEMENT

A customer journey represents the phases or stages a customer goes through before converting or accepting a specific outcome. For example, a New Credit Card journey attracts customers to sign up for a credit card. A journey is made up of many individual messages and communications such as email, SMS, push, or social ads that occur over time. Customer journey allows users to visualize how customers progress through the journey and determine the most successful messages and channels. This helps identify where resources should be best deployed.

CUSTOMER LIFETIME VALUE OPTIMIZATION

Maximize revenue with proactive cross-sell, up-sell, and retention opportunities for customers, and coordinate the experience across inbound and outbound channels. The solution provides the optimum balance between various customer needs and the specific needs of the business.
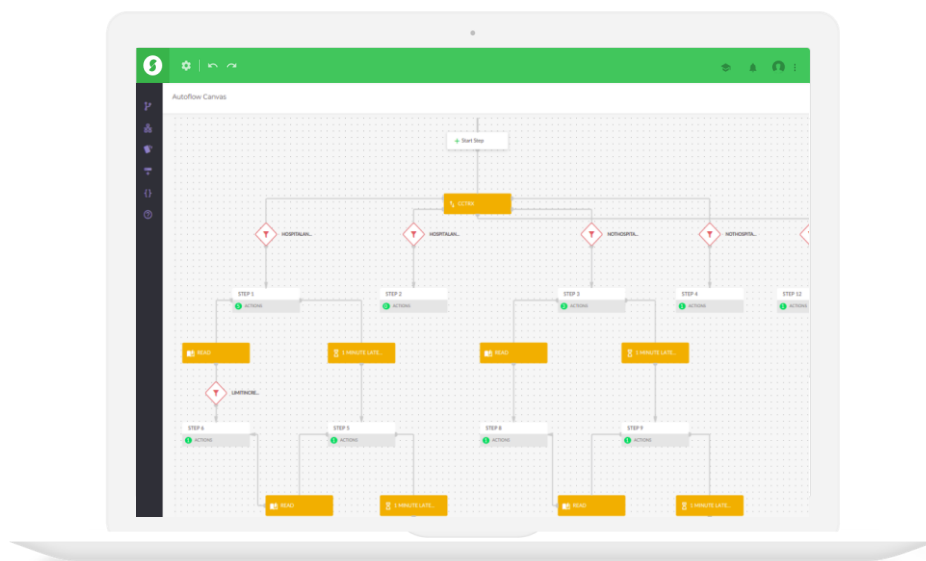
2.2. Key Features and Capabilities

MARKETING AUTOMATION

Our drag-and-drop interface allows you to easily build automated marketing programs with a variety of event-based triggers, rules and actions.

COMPLEX EVENT PROCESSING

AutoFlow Complex Event Processing capabilities allows marketers to evaluate high volumes of data from various sources to detect changes in behavior in real-time and over time.
Key CEP features include pattern matching, user-defined windows for event evaluation and the contextual enrichment of events.

OUT-OF-THE BOX LIFECYCLE MARKETING WORKFLOWS

Engage at every step of the buyer's journey with out of the box lifecycle marketing workflows *(Welcome, Website Triggers, Nurturing, Upsell, Renewal, Loyalty, Retention Campaigns).*

INTEGRATED LEAD MANAGEMENT CAPABILITIES

Move leads through the pipeline with integrated lead management capabilities. *(Lead Scoring and Grading, Lead Nurturing campaigns, Automated tasks and alerts depending on Lead Score and Grade).*

CUSTOM BUSINESS RULES AND ACTIONS

Specify event detection, targeting rules, and custom actions to acquire, retain and cross-sell customers more efficiently.

REAL-TIME TRACKING AND REPORTING

Keep track of your customers' behaviors at each step and know exactly what keeps them engaged with in-place reporting.

3. KEY FUNTIONALITIES

3.1. Real-Time Events

Events provide a mechanism for responding to real-time marketing opportunities. An Event is, essentially, an entry-point into the marketing application which can be initiated by internal or external systems. Events can be mapped to Multi-Channel Campaigns and can trigger their execution.

Sample Events for the Banking Industry

- Product or service-centric customer activity, interactions or inquiries at a business touch point, such as visiting a webpage, doing a keyword search, installing a mobile app, filling out a form, or responding to a prompt on an ATM display.

- Sudden changes in a customer's routine banking or interaction behavior, large pay downs, new zero balance, overdrafts, new credit card applications, large deposits, large transactions – or any combination, pattern, or sequence of behavioral events.

- Call Center calls or any form of communication from a customer with regard to products, services, complaints, or need for information.

- Name changes, changes of address, birthdays, anniversaries, children reaching college age, home purchases, and other personal events that signal life-stage or lifestyle changes or significant moments – as well as any date-driven triggers.

3.2. Conditions

Conditions are the checks that decide if the action are taken on a set of users. Complex rules with AND/OR groups and statements can be defined/configured using the rule editor. Defined rules are executed over event parameters, variables or any data that exists in the event context.

3.3. Real-Time Actions

Actions is how you interact with a user based on an event trigger. Actions like *Send an Email*, *Send a Push Message, Send an SMS, Display a Facebook Ad* can be placed directly on the flow canvas.

3.4. Contact List Management

By using the list editor feature, users can create multiple contact lists to target specific customer segments and to automatically individuals in and out of lists based on their real-time behavior across workflows. An automation workflow can be triggered for a user based on entry/exit or being a part of a specific list.

3.5. Data Enrichment

AutoFlow CEP platform utilizes external data sources extensively to enrich event processing context on-the-fly. By configuring a data source, you can use database queries, REST API calls, and extend event context to use additional data.

DATA ENRICHMENT THROUGH DATABASE CONNECTIONS – Through database enrichment interface, you can configure and use ODBC supported database connectors to query internal/external data sources such as CRM dataset.

DATA ENRICHMENT USING REST API'S – Through REST API enrichment interface, you can define several REST API requests by passing URL, method and credentials info, then use it during event processing.

CUSTOM SOLUTIONS – According to customer requirements new enrichment interfaces can be developed using our SDK.

3.6. Multi-Channel Delivery

Built-in, highly scalable Email, SMS, Mobile Push campaign deliveries *(Built-in integration with SmartMessage Engage Campaign Management Module).*

3.7. Real-Time Reporting and Monitoring

The following live stats are available right on the canvas with in-place reporting:

- Total entries in the journey
- Total contacts presently in the journey
- Total exits from the journey

Also, on every step, you see a count of users who've reached that step and who are presently on that step. The difference if any indicates the number of users who have crossed that step. These stats are auto-refreshed every time there is an actual update, allowing you to get monitor results in real-time.

4. COMPONENT ARCHITECTURE
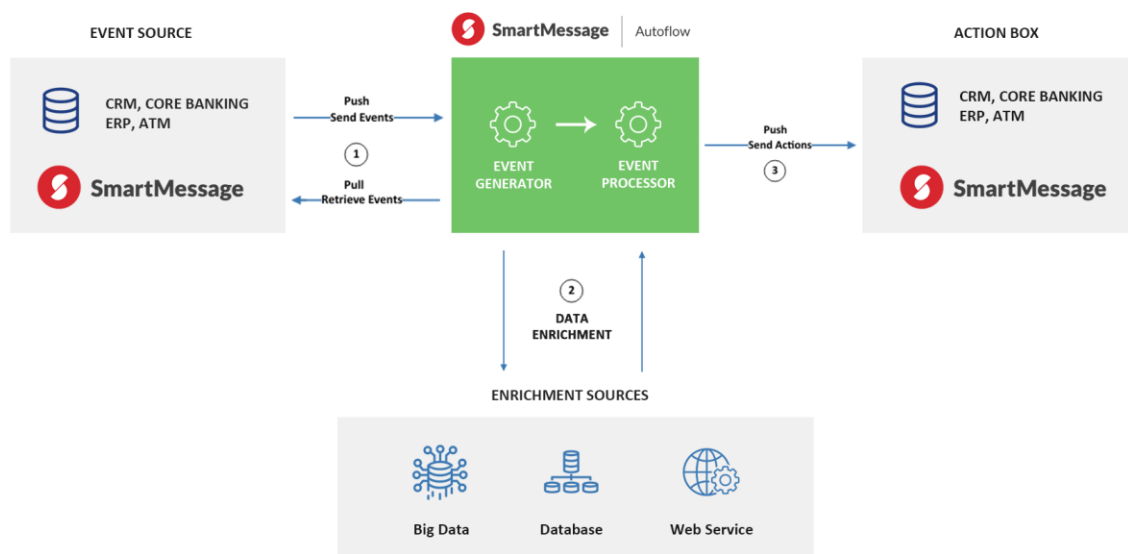
1. **Event Generator –** Autoflow uses the Event Generator component to feed events from external data sources to the Event Processing Engine. Event Generator can get data from several interfaces. Some of the most used interfaces are REST API/Web Service, File/Spool Directory, Database, RabbitMQ, Syslog.

2. **Data Enrichment –** AutoFlow CEP platform utilizes external data sources extensively to enrich event processing context on-the-fly. By configuring a data source, you can use database queries, REST API calls, and extend event context to use additional data.

3. **Action Box –** Send Actions to Internal / External Systems.

5. PLATFORM AND INFRASTRUCTURE

5.1. Deployment

Choose On-Premise, Private Cloud or Public Cloud (SaaS) options.

5.2. Integrations

Open API supports integration with a variety of 3rd party systems and solutions.

5.3. User, Roles and Access Management

- *Enterprise authentication* – Predefined roles that allow admin users to assign permissions to users based on their job function.

- *Audit Trail* – Detailed reporting for user login and activity history.

5.4. Internationalization

View and transact communication with the same content in multiple language and currencies.

5.5. Performance

- **ROBUSTNESS –** Components of AutoFlow CEP platform are designed to execute events in near real-time without compromising data persistency and robustness.

- **HIGH AVAILABILITY –** AutoFlow platform consists of high available components that watch for specific metrics and alarms. If any node or components becomes inaccessible, automatic deployment processes handle the case and provide high availability by recovering failures.

- **SCALABILITY –** AutoFlow Core Engine and components can scale according to the volume of processed events per second, count of automations deployed in the setup, or another built-in strategy configured by the user.