Intilery

The art of engagement
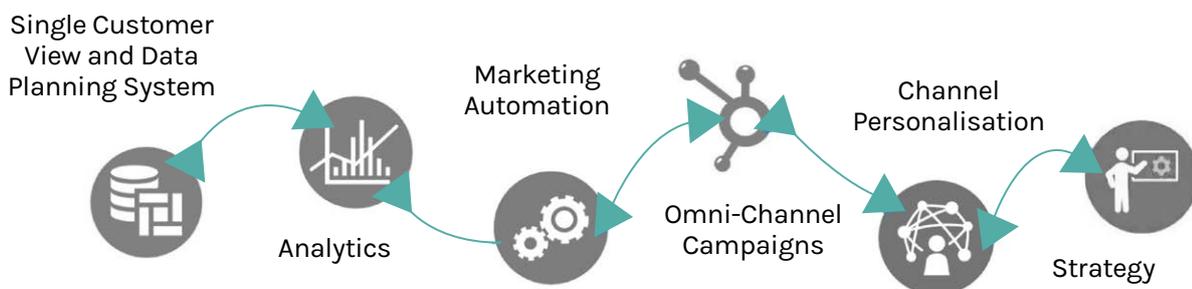
Platform Features 2016

About Intilery

Intilery is the next generation customer engagement technology specialist.

We help organisations transform their approach to marketing by providing an integrated, omni-channel, real-time view of customer behaviour across web, email, mobile, app, social and offline channels.

By providing both agile, innovative software and comprehensive support, Intilery enables businesses to build relationships with customers and optimise on short and long term revenue opportunities.

Monetize Customer Experience

Single Customer View and Data Planning System

Analytics

Marketing Automation

Omni-Channel Campaigns

Channel Personalisation

Strategy

3	Data Sources and Collation	
4	Data Interrogation and Manipulation	
5	Campaign Builds	
7	Campaign Execution	
10	Reporting	

Features	Benefits	And so…
Single Line of Code	Installation can be completed in days, which means strategy can be implemented faster	Achieve increase in ROI in year
Real-Time	So you can communicate with customers the instant they display explicit/implicit behaviour	Increase conversions, decrease the time between browse and buy
Single Customer View	Can collect all customer data in one place, in chronological order	Can contextualise comms making them more relevant, Improving chance of conversion
Data Planning System	Provides the ability to interrogate and segment behavioural and transactional data, on any variable including geolocation	Empowers marketers to control workflow – speedier campaign production
Marketing Automation	Enables the production of a sequence of planned comms stages to be executed automatically	Gets the right content in front of the right customer at the right time. Improved chance of conversion.
A/B Testing	Test response to any number of variables across channels	Improve conversions lower CPA
Responsive, Flexible High Volume Email Build and Send	Build and send dynamic emails in one system, dispatch in high volumes at speed with excellent deliverability rates	Faster campaign production & results
Onsite Personalisation	Target content at the right time to the right customer whilst onsite	Improve conversion and retention & CLTV
App Optimisation	Communicate in a personalised way straight to the hands of targets	Improve speed of conversion & engagement
SMS	Instant engagement straight to the hands of targets	Improve speed of conversion
Reports	Understand how successful your campaigns are in realtime	Report back to the business immediately or/and amend strategy quickly
Integration	Integrated with off and on line channels to gather data from multiple sources, providing a holistic view of the customer.	Improve relevance, improve conversion, personalise & at a granular level

Data Sources and Collation

Intilery
The art of engagement

Data can be collected via 1st, 2nd and 3rd party channels.

1st party data - channels and source examples -

- Email
- App
- SMS
- Onsite behaviour
- Landing pages
- Transactional systems
- CRM systems
- Direct marketing programmes,
  e.g. brochure or catalogue requests

- Telephone systems
- Epos systems

2nd and 3rd party data is essentially somebody else's first party data. Sourced from trusted partners, can be integrated to provide a more in-depth customer profile.

Examples include -
- Review centre software
- Remarketing partners
- Paid ad page scrapes
- Affiliate partners

Data Sources

A data source is a way to gather data for use within a programme, email or onsite module.

The data contained within these data sources could come from CSV files, a Data Warehouse or custom data collection through API's or similar. Some examples:

- Postcode to destination mapping
- Destination look ups
- Geolocation
- Social content
- Generate recommendations
- Last searched content
- Product reviews

API Calls to Trigger
- Mobile phone push registration
- Campaigns
- Programmes
- Events

Mobile App Integration
- Integrate through SDKs for iOS, Android or react-native
- Send push notifications
- Track usage
- Link customers across devices, web and email

Bespoke Integration
Intilery often take in feeds of data for other live changes (e.g. stock or price changes)

Single Customer View (SCV)

All data is collated into a central repository – called the Single Customer View.

- Stored in the cloud
- Dedicated IP

SCV properties on a customer are based on:

- Real-time data collection
- Facts, averages, counts
- Time based event groupings, actions or data
- Time based grouping based on imminency or recency
- Time sensitivity on SCV properties
- Geo based SCV properties on distance
  or nearest 'store' for example

List Management

As well as organically collected data, data can be uploaded via lists.
Lists, segments or queries can be excluded from campaigns or programmes.

Intilery
The art of engagement

Data Planning System (DPS)

A simple to use front end to a structured query language (SQL) tool to identify groups of customers on any property set via the Single Customer View. This can include properties from multi-channel sources to provide the optimum flexibility.

- Real-time data filtering
- Data Visualisation
- Trend analysis and real-time counts
- Behavioural analytics
  - Identify needs based on:
    - Recency
    - Frequency
    - Volume
    - Value

An examples could be –

Customers who made a purchase/booking in the last 2 days onsite, searched for 3 products or more, and live in the London area.

Or

Prospects who have never purchased but searched for a product of high value in the last 10 minutes and abandoned.

Or

Customers who have downloaded and opened the app and responded to an app push notification and opened an email in the last 2 months.

Segmentation

Segment your customers based on defined criteria. These segments can then be used to send targeted campaigns to specific segments or exclude the customers in certain segments from receiving the campaign at all.

There is a wide variety of segmentation criteria including but not limited to:

- Date & time
- Customer properties
- Campaigns
- Events
- Sources of traffic

SMS   Onsite   Email   Apps   Social   Store

Campaign Builds

Intilery
The art of engagement

Campaign Types

From within the Intilery platform, clients can execute campaigns across the following channels -

- Email
- SMS
- Social
- App push
- Onsite

Whatever the channel, all campaigns have the ability to contain dynamic personalisation which allows for a fully customised final rendering for each customer all whilst using the same initial template definition.

Email

- Volume – capable of sending 3 million emails per hour
- User access restrictions where required
- Reply address inclusion
- Flexible drag and drop snippet builder
- HTML email build option
- Subject line & pre-header
- Device responsive for mobile, tablet, desktop and large screen
- Reusable templates
- Unsubscribe pages
- Option to include dynamic behavioural content sections dependent on segment or device
- T&C's global merge fields
- Sender authentication, including
  - Policy framework
  - Sender ID's
  - Domain keys/DKIM
  - Private domain

Responsive Email Builder

The Intilery platform offers a fully integrated responsive HTML email builder. The email builder has a vast range of features which include the following –

WYSIWYG Editor
The email editor has a drag and drop interface which allows users the flexibility to see exactly what is being built.

No knowledge of HTML and/or CSS is required to build responsive emails in the Intilery platform.

Emails are built using flexible snippets. Within templates users can –

- Move snippets around
- Delete sections/snippets
- Insert snippets
- Copy and save snippets

Custom Snippets
Snippets are used to construct the email content and can vary in complexity. There are several content container snippets defined by default but custom snippets can be created.

Nested Snippets
The ability to nest snippets makes it much easier to create the desired layouts you require. It is easy to separate content into structured columns and/or sections depending on your needs.

Responsive Elements
Emails are responsive by default. This means you can create and modify one template and have them respond to the target device, with four varying size options.

Previews
You can preview the email in its current state using the preview interface provided, and send it to yourself or a number of contacts for proofing purposes.

Device Specific Content
It is possible to specify sections of the email template to only show on certain device types. For example, you can specify certain snippets to only show on mobile devices or only show on desktop(s).

Repeating sections
To prevent duplication in the template structure, you can define certain snippets to repeat based on defined logic. For example, you can define a repeater for a customer's abandoned basket, the email builder will automatically create the correct amount of content for you.

Conditional Sections
Sections of the email only visible on a condition of a property.

Litmus Integration
The email builder comes with full Litmus integration allowing you to visualise the email in a wide range of mobile desktop and browser layouts. Also includes a full spam reporting feature.

Campaign Builds

Onsite

Onsite campaigns can take many forms depending on objectives and type of business but the following list provides some examples of platform capability -

- **Gesture to leave** pop-up or sliders - alert the current user when leaving site based on custom criteria to encourage conversion.
- **Email sign up pop-ups** - designed to encourage email acquisition, can be linked to onsite behaviour so appropriately targeted.
- **Social Media Connections** - offer the ability to integrate with social media platforms for projects such as competition sign ups or similar.
- **Content Personalisation** - give each customer a personalised rendering of specific or all pages based on previous behaviours or other criteria.
- **'Hot' Products** - Inform users about important details such as
  - Most popular products
  - X number of people viewing this now
  - Last bought xx mins ago
  - Almost sold out
- **Recently Viewed** - show products the user most recently viewed. Can be used to drive recommendations and dynamic content.

Recommendation Engine

There is a multitude of ways recommendations can be used and are implemented on a case by case basis. Some examples include but are not limited to:

Most Viewed by Category - Display the most viewed product for specific categories
Also Viewed - Show what other viewers of this page or product looked at.
Also Searched For - Show what people using the same search term viewed.
Also Purchased – Customers who purchased this product also purchased.
Also Added to Cart – Customers who selected this product also added this to cart/basket.
Trending – Provides a list of products experiencing a sudden increase in popularity.
Most Popular – Present current 'hot' products or most purchased items.
Purchased Together - Items that are typically purchased with the same viewed product.

SMS

- Upload mobile list by customer
- Tier 1 network, direct network connections capable of sending up to 8000 texts per second.
- Link shortening
- Include attachments
- Gather feedback via surveys
- Include e-vouchers
- Automated response
- Send internationally

Push Notification

- Send push notifications to your appl users across both Android and iOS platforms.

A/B Testing

Intilery provides a powerful testing platform. Test any variable across any channel. The functionality comes with automated 'winner' execution.

Campaign Execution

All campaigns can either be set up and scheduled as single events or included as part of a single or multi-channel programme.

Single Step

- Advanced scheduling
- Concurrent campaign enabler
- Flexible selections from a variety of saved sources or behavioural triggers
- Test and validation option
- A/B testing function
- Editable steps
- Export list function

Multi-Step

Programme Function

Programmes are used to manipulate data and communicate with customers on an individual basis, depending on a varying amount of programme defined logic and/or pre-defined filters. Programme steps are split into several categories and a programme can consist of one or more of the following step options.

Trigger Function

This facility is used to start the programme. A trigger can vary in complexity and can include:

Time Triggers

Start the programme at a given time in the future or immediately.

Event-Based Triggers

Start the programme for a customer when the corresponding event is raised for that customer.

Recurring Trigger

- Never
- Daily
- Weekly
- Fortnightly
- Monthly
- Quarterly
- Annually
- Programme Inclusions/Exclusions

Limit By

- Segments
- Customer List
- DPS Query
- Non Opens/Clicks

Any of these options can be configured to only allow customers who meet required criteria to enter the programme. Programmes are dynamic and customers' behaviour will influence how they drop in and out of programmes.

Exclude By

- Customer List(s)
- Segments
- DPS query

Actioned in the same way as inclusions.

Programme Steps

Conditional Functions Available

Continue
Define logic using a custom JavaScript function. If function returns a false evaluation, the programme will end for the customer at this step in the programme.

Data

- **Assign Code** - assign a discount code to a customer in the programme if applicable.
- **Raise Event** - raise a custom event to the Intilery system. This can be used to trigger additional event-based triggered programmes.
- **Modify Data** -use custom JavaScript to modify existing customer data
- **Query Data** - query for customer data using various filters.
  - Specific Events
  - Session Specific Data
  - Sort Data (define sort field)
  - Custom JavaScript Functions
- **Data Source** - query a predefined data source for the required data
- **Find Entity** - find and return a specific entity in the defined model
- **Export Data** - export customer data to an external CSV.

Messaging

- **Send Email** - used to send a predefined email campaign to the current customer using their email address as the recipient.
- **Send SMS** - send a predefined SMS campaign to a customer. This will use the current value stored against the customer for the field defined in the SMS settings.

- **Split Test** - define a split test using an email campaign and its variations with custom definitions on defining a winner.
- **Send Push** - send a predefined push notification campaign to the current customer.

Programmes

- **If Then** - use custom JavaScript to evaluate an expression. In addition to this you can define the behaviour to execute should the JavaScript return true.
- **Start** - use this to restart the current programme or start a different programme entirely.

Segments

- **Add To** - add the current customer to a predefined segment.
- **Remove From** - remove the current customer from a predefined segment.

Wait

- **Wait** - wait for a defined period of time. This time period is defined by days, hours and minutes. Example – when a promotion is scheduled to go live.
- **Wait Until** - define a period in time by day of the week, hour of day and minute of day. Alternatively use a custom JavaScript function instead. Useful when dependant on a customer completing other actions.
- **Wait For** - this can be used to wait indefinitely or for a specific event to be raised in the Intilery system. Often used in service related campaigns.

Campaign Execution

Campaign Filters

Before a campaign is dispatched from within the Intilery platform it is subjected to a number of filters. These filters are defined to reduce complications which arise from sending (inadvertently or otherwise) explicit material or sending to the wrong/ineligible customers.

Filters include but are not limited to:

- Subscribed status
- Whitelists
- Send limits
- Email validation
- Exclude emails based on regular expressions
- Excludes profanity filter

Unsubscribe Forms, Opt In, Opt Out
Email subscription preferences/categories (localisable/language specific too)

Asset Manager
Content Delivery Network (CDN) delivered assets

Trading Calendar
Calendar of events to aid planning of campaigns

Email Suppressions Groups
Limit the emails customers receive by campaign category levels, i.e. Welcome and onboarding could be one category, abandoned basket trigger could be another or newsletters etc.

Marketing Automation

To ensure clarity of customer contact a number of programme steps can be created that ensure Customer Journey Management is as effective as possible. This can include any number of steps across any channel, pre-sale, during sale, but importantly after sales service communications. Examples of use are;

- Conversion prompts e.g. abandoned search or abandoned basket - triggered by last search criteria.
- Part-filled form prompts to encourage completion

- Receipts
- Delivery notifications
- Post sales review campaigns
- Voucher redeeming campaigns and process stages
- Special offers
- Post experience research

Reporting

Standard Reporting

Dashboard Overview
- Visitors active on site in real time
- Users reading emails in real time
- Onsite events undertaken live
- Number of sessions and visitors at any one time
- Live programmes running
- Live emails sent/opened

Customers
- Count of current customers
- Subscribed customers
- Number of anonymous onsite visitors

Full view of customer activity including a session-by-session breakdown of individual customer interactions, including –

- Campaign sends
- Up to date customer properties based on most recent event data
- Imports of existing customers
- Visibility of every campaign sent to each customer
- Preview of every campaign sent to each customer with customer specific data rendered (if applicable)
- Anonymous visitor tracking as well as known customers

Email
The following data is readily available for every email campaign -
- Number of sends
- Number of opens
- Number of received
- Number of unopened

- Number of clicks
- Number of transactions
- Transaction amounts
- Number of bounced
- Number of marked as spam
- Number of not sent
- Send duration
- Click through statistics
- Not sent reasons
- Number of unique clicks
- Click heatmap
- Breakdown of Device type/Browser
- Breakdown of Domain Activity
- X sends to @intilery.com
- Filter report data by Date Range

SMS
- Number of sends
- Number of received
- Number of not sends
- Breakdown of delivery status
- Send duration
- Filter report data by date range

Push Notification
All data is available in the Intilery web application and certain data can be exported to a CSV file and saved locally. Standard reporting includes:

- Number of people sent the push notification
- Number responded to it
- Timing of response
- Device opened on

Automated Reporting

A fully automated reporting system capable of delivering customer data analytics reports with the following features.

- 24/7 reporting, allows for out of hours report generation
- Deliver across SFTP or email
- Password protected archives
- Custom reports created by our analytics team

Bespoke Reporting

Bespoke reports can be built around any criteria required by clients depending on desired KPI's and business objectives. In addition, clients can access raw data if required or import it into existing in-house analytical systems.

Data Warehouse and Analytics

- Configurable dashboard reports
- Access to raw data for investigation, data science, machine learning
- Access to raw data with hashed/obfuscated PII