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# MARTECH

EDITION

**HARNESSING THE  
POWER OF MARTECH  
AND DATA FOR GOOD**

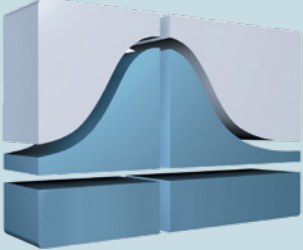


**DATA  
SQUARE**

DR. DEVYANI SADH,  
CEO AND CHIEF DATA OFFICER



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# DATA SQUARE

## HARNESSING THE POWER OF MARTECH AND DATA FOR GOOD



By Joe Phillip

**E**very brand today needs a flexible marketing strategy that synchronizes with shifting consumer behaviors and provides inclusive, inspiring, and distinctive experiences. However, creating tangible value from digital marketing campaigns is an uphill battle for many organizations. The first reason is their inability to organize and synthesize data from disparate systems coming in at varying velocities and volumes. The second hurdle lies in deploying marketing campaigns that fully leverage the power of data. In essence, they are drowning in data but starving for knowledge.

“Incorporating actionable insights from data is both science and art, and requires a quadruple skill set,” says Devyani Sadh, CEO and

chief data officer at Data Square. A combined understanding of marketing, analytics, data management, and IT is a key differentiator. Data Square has built an integrated marketing platform, CRM Square, to synergistically tackle the natural intersection between these domains. CRM Square is a campaign and email automation tool that sits on top of a managed customer data platform (CDP) powered by BI, AI, and predictive analytics.

Data Square’s vision is to streamline businesses’ omnichannel marketing campaigns with strategy powered by a fusion of database, advanced analytics, and decision support technology for email and campaign management. The CRM Square solution is a physical representation of that vision.



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## CRM Square—Squaring up the Data Gap

The core of CRM Square is a platform layer that connects various functional areas and systems through pre-built applications, API connections, and custom configurations. This layer serves as the hub of the technology ecosystem, with data at the epicenter. It cleanses, transforms, and unifies large volumes of heterogeneous data traveling in real-time to enable value and insight generation.

“A combination of human intelligence and AI methodologies are used for developing identity resolution, source prioritization, and surviving record logic. Additionally, CRM Square includes value-based enrichment options with third-party data to create a 360-degree view of the customer and support downstream customer journeys. It successfully addresses the 5 Vs of Big Data—Velocity, Volume, Variety, Veracity, and Value,” says Sadh.

The Report and Analytics modules of CRM Square help generate insights and predictions needed for targeting, personalization, and segmentation. The Campaign module leverages the insights-driven contact strategy and analytically optimized audience selection, messaging, and touch sequences developed by the other modules. It creates customized cross-channel contact lists for relevant communications based on user attributes, preferences, history, interests, and model scores. The Email/Digital Module helps deploy trigger-based and dynamically personalized digital campaigns that are automated based on customer interactions. The Contact Module empowers sales teams with customer intelligence, lead scoring, and recommended actions for phone or in-person interactions. Essentially, the platform enables marketers to go beyond multi-touch to omnichannel marketing. With its customer-centric approach, it breaks through channel silos and captures dynamic interactions between channels. The closed-loop system allows for segment-specific attribution of results and ROI on marketing activities using control groups.

While Data Square’s solutions have a track record of success across a wide range of metrics and verticals, a recent example of CRM Square’s efficacy is an integrated

marketing campaign that used email, direct mail, and phone. Direct mail and phone, with static targeting and segmentation, typically yield good ROI, but are expensive channels. To add value, Data Square went a step further. First, real-time data from email clicks were used as interest indicators, along with other attributes within a predictive model. Next, dynamic model scoring was utilized to identify and triage contacts for a call, direct mail, or

second email with a personalized message. The intersection of three channels, predictive analytics, dynamic model scoring, marketing automation, and real-time campaign evaluation capabilities, resulted in phenomenal double-digit gains in response rates compared to a control group.

### The Human Touch Always Matters

Although CRM Square is designed to work as an independent unit, Data Square has ensured that each component can be used on a standalone basis to accommodate variations in organizational maturity levels, needs, and tech adoption readiness.

Over two decades of client engagements have helped the company understand that the platform alone is insufficient to realize success. Optimized implementations require a fusion of people, processes, and technology. That’s why, for years, the company has successfully used a solution-based approach that combines executive-level consulting, software, and services to address the challenges individually and in tandem.

“We prioritize human intelligence over AI and strategy over technology while focusing on a select group of clients versus a factory-based approach. Although our platform has multiple components, it can be used à la carte and is fully customizable based on needs and budget. We place integrity and ethics before profit and believe in the notion of partnership, whether it is with our clients, their customers, or other service providers in the same space,” says Sadh.

Going beyond creating advocacy for the responsible utilization of data, Data Square recently launched a new release of its customized platform, CRM Square NFP,



as part of the Data for Good initiative. Its goal is to empower nonprofits and socially conscious organizations to reach their missions by harnessing the full potential of data, analytics,

“This is a passion project in which I’m personally involved, and we are actively seeking partnerships with organizations working for the greater good,” states Sadh.

## We prioritize human intelligence over AI and strategy over technology while focusing on a select group of clients versus a factory-based approach

and martech. This integrated marketing platform is specifically designed to meet the fundraising, membership, and donor cultivation needs of nonprofits. It comes with special pricing that contradicts the adage - you get what you pay for. Data Square is currently offering free campaign management services for nonprofit platform users.

### Clients at the Center of the Data Square System

Rather than fitting off-the-shelf solutions, Data Square typically leads with a consulting approach to identify gaps and opportunities within an organization’s technology and data ecosystem. Clients’ martech and analytics maturity levels along with their readiness to incorporate new

components will generally lead the way.

In situations where the budget is tight or unassigned, Data Square steers clients toward pre-built solutions, low-hanging fruit, quick wins, and high-ROI areas to develop the business case. For organizations with an identified need, the company begins with use-case scenarios, requirements-gathering sessions, and an assessment of potential roadblocks. Data Square has found user training and stakeholder consulting sessions to be critical success factors in ensuring optimal adoption and utilization. Whether implementing just one or multiple modules, the company adopts a holistic design approach that considers the typical uses of a system - past, present, and future. For example, if Data Square is only hosting a cloud-based customer data platform, the company would ensure it is BI-, analytics-, and campaign-ready for downstream consumption.

Many of Data Square’s advanced solutions have been used by larger B2C and B2B organizations with big budgets. Yet, technology is a great equalizer, and the company is actively pushing the boundaries to bring similar benefits to mid-sized companies or smaller business units within large organizations. It is continuously working on expanding the portfolio of scaled industry-specific versions of its platform in the mid-market space.

Additionally, Data Square is actively involved in enhancing the AI and machine learning algorithms that feed customer journey orchestrations while adding integrations with value-add partners. These initiatives will make the CRM Square solution even more robust and equipped to meet the evolving needs of the Analytics and Martech sectors. CA