



# FEATURES AND SERVICES

LIST

# CUSTOMER DATA

Centralize all the information about your contacts and get a 360 degree view of every customer to better know them, develop your business intelligence and offer a personalized experience.

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## Data client acquisition and management

- Types of forms (including web interceptors) for consents and prospecting
  - Survey, contest and event tool
  - Single Customer View
  - Import/Export of data (manual and automated)
  - Complete extraction of behavioral histories
  - Intelligent personalization indicators (Persona, Score, Scoring)
  - Dynamic segmentation of contacts by group
  - Comprehensive client profile and behavioral history
  - Geolocation (postal code, IP address, longitude/latitude)
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## Data structuring

- Flexible data architecture compliant with GDPR and C-28
- Multiple relational data / Schemas / Queries
- Transactional Data Structure (eCommerce)
- Web behavioral monitoring (known and unknown)
- Data Transformation
- SFTP Servers
- Database analysis (field values)
- Elimination of duplicates and data cleansing
- Management of business rules for data unification
- Complete business process module (customized projects)



# CAMPAIGN ORCHESTRATION

**Campaign orchestration allows you to carry out a set of marketing activities through different channels online or offline, to offer a memorable customer experience at every point of contact.**

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## Emails

- Drag & drop, HTML and Wysiwyg editors
- Automatic generation of a text version
- Development of custom templates in drag & drop (advanced users / resellers) with personalized blocks
- Responsive options
- Personalized images (via Nifty images)
- Configurable countdown option
- Quick addition of barcodes (generic or personalized depending on the contact)
- Generating content from your RSS feed
- Publication of a Web version
- Adding attributes to hyperlinks (ex.: Google injection rules)
- Management of authorized shippers
- Profile update with one click
- Operational links (modify a field in the Database)
- Multi-platform message preview and sending simulation
- SMTP relay with delivery alerts
- Control of the delivery rate
- Management of delivery errors and Spam complaints
- Customizable frequency limit (commercial pressure)
- Exclusion blacklist
- Creation of messages from a content database (e.g. Excel file)
- Dynamic content and display conditions
- Dynamic scheduling of offers
- Product recommendation
- Quarantine of addresses in error of delivery
- Subscription management (opt-in - opt-out)
- Delivery according to a fixed time zone or according to contact
- Sending rules (timing and targeting)



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## SMS

- Content personalization
- Response management (pre-recorded responses)
- Exclusion blacklist
- Long and short numbers (\$)
- Restriction management (Act)
- Subscription management (opt-in – opt-out)
- Delivery according to a fixed time zone or according to the contact
- Sending rules (timing and targeting)

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## Web notification

- Content personalization
- Subscription management
- Delivery according to a fixed time zone or according to the contact
- Sending rules (timing and targeting)

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## Mobile notification

- Content personalization
- Subscription management
- Delivery according to a fixed time zone or according to the contact
- Sending rules (timing and targeting)

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## Multichannel management

- Multichannel campaign manager
- Web landing pages
- Hosting space
  - PDF and images
  - Image Editor
- Management of campaign offers / Product catalog / Content hub
- Dimensions for contact segmentation
- Management of the allocation of offers to segments



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## Marketing automation

- Various triggers (on date or behavior)
- Multiple entry points
- Conditions on behavior or contact fields
- Multichannel sending (Email, SMS, Web Push)
- Automated contact update
- Quick access to resources associated with the campaign (group, message, etc.)
- Campaign and milestone statistics
- Export of the history of entries
- Pre-configured templates or customized template configuration

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## Calendar

- View of planned marketing actions in the Dialog Insight application
- My actions (edited and created from the calendar)
- Display of current date, current period, available views
- Exporting the calendar
- Printing your actions
- Search box (according to different criteria)



# MARKETING PERFORMANCE

Use predictive tools to guide your decisions and utilize our analytical tools to determine the performance and the financial results of your decisions.

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## Results / Statistics

- By channels (sending and communication)
- Customizable performance indicators (KPI)
- A/X tests (decision on openings, clicks and conversions)
- Reports by segment
- Visual analysis of clicked links (HeatMap)
- Automated email reports
- Sharing of results
- Conversion rate and amount (transactional)
- Complete eCommerce (transactions, income, best products)
- Return on investment calculation (ROI)
- Benchmarking tool by industry
- Custom Reports
- Conversion funnels
- Automatic cost calculation
- Google eCommerce integration



# CONFIGURATION OPTIONS

Adapt Dialog Insight's technology to your business strategies through our completely flexible approach, from our technology solution to our support teams.

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## Connectors / Integrations

- Data exchange via web services (API)
  - Webhooks
  - Magento
  - Shopify
  - LightSpeed
  - Facebook
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## Users

- Management of user permissions and roles
  - Partitioning by location, business unit or division
  - Complete distributed marketing solution
  - Unique Identification / single sign-on (SSO SAML)
  - Management of security options
  - Full audits (access, security and actions)
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## Account management

- DKIM configuration (delivery insurance)
  - Customized and secured domains (CNAME and SSL)
  - Dedicated IP address
  - Reputation management
  - Customization of the input interfaces in the application
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## Infrastructure

- High-capacity secure infrastructure
- Available in France and Canada
- SOC 2 certification (ISO 27 000)



# SERVICES PROVIDED

A collaborative, scalable and modular approach aligned with your needs and context, for an optimal personalized experience.

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## Strategic services

- **Strategic pole**
  - Relational program planning
  - Calendar of annual content
  - Advice on actions underway and strategies already developed
  - Development of omnichannel strategies
  - Mapping of customer journeys
  - Development of automated scenarios (onboarding, retention, forgotten basket, spend simulation, lead generation and nurturing)
  - Relationship marketing and contact acquisition strategy
  - Strategic approaches/recommendations on existing campaigns, management of opt-ins
  - Audit of existing communications (email, auto scenarios, etc.) with report, including recommendations and best practices.
  - Personalization plan
  - Onboarding new clients
- **Technical/analytical pole**
  - Coaching in analytical thinking related to business and marketing objectives, within the framework of activities carried out with the platform.
  - Assessment of the health of the contact pool and campaigns using Dialog Insight to refine customer knowledge.
  - Assessment of contact engagement and the impact of commercial pressure on contacts
  - Support on the structure of the database
  - Dashboard development, performance review
  - Analysis of your KPI's
  - Performance tracking on personalization strategies





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## Management and production

- Project manager assigned for major projects
  - Schedule and budget management
- Business and IT analyst for complex or advanced custom projects
  - Ensures project planning, with technical deliverables
- Access to front-end developers for message integration, web page integration, automated scenario creation, and more technical platform management.

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## Ressources

- Formation de départ
- Formation à la carte, selon les besoins
- Formation sur mesure, basé sur les projets implantés
- Support technique (courriel et téléphone) - Banque d'heures disponible
- Aide en ligne:
  - Articles
  - Vidéos
  - Librairie de ressources:
  - Webinaires
  - Démonstrations
  - Livres blancs
  - Articles de blogue
  - Etc.



# ABOUT DIALOG INSIGHT

One of the most effective ways to achieve your growth goals is to take control of your customer data to maximize your marketing efforts.

At Dialog Insight, we believe that each of our customers is unique and that their needs are specific. Therefore, we have developed a Customer Data Platform that adapts to your changing context. On the one hand, we provide you with a unified platform that centralizes customer database, campaign orchestration tools, and detailed analysis of your performance. On the other, we offer strategic support services aligned to your needs.

Whether you're looking to increase sales or engage your customers, leverage customer insights you've gathered over time. You will communicate in a more relevant, coherent and personalized way than ever before. Make every point of contact an opportunity to offer your customers a brand experience beyond their expectations.

**With Dialog Insight at your side, you are more than ever the master of your success.**



