

Direct Commerce Innovator awards 2017: IA018/17 – Golden Orb

Compas: cloud-based Marketing Management System

Backgrounder

Compas grew out of a bespoke piece of software originally developed for Unilever UK, which needed a set of tools to plan and manage their trade promotion activity. The tool (called 'PROMIS') contained many of the key features of Compas: the ability to plan/report at both the promotion level and by time, detailed pre- and post-evaluation of activities and automatic updating of running activities based on actual sales received to date.

This project was followed by an extended piece of work for Direct Wines, which sought to address a number of key issues of concern to the then CEO, including:

- Lack of good and easy reporting for marketers (data analysts spent much time performing ad-hoc requests and routine reforecasting)
- A cumbersome budget process involving multiple linked spreadsheets
- Different business practices, terminology and KPI calculations between teams
- Slow and opaque continuity forecasting

At the same time, the business faced a number of challenges resulting from its rapid expansion and international growth. The CEO wanted to give all marketers the tools to enable them to excel at their jobs: to spend less time doing routine tasks, to think more entrepreneurially and to learn from and share experience on how to maximise ROI.

What they required was a complete global Marketing Management System, providing:

- A single version of the truth across all departments and markets
- Everything tied back to the marketing plan – if the marketing plan changed, all departments would see the impact
- The tools, data and reporting to support a world class marketing function
- Mathematical modelling to forecast customer lifetime value and future continuity sales
- Rich data to support strategic decisions on how to allocate the marketing budget between different channels, markets and brands

The Direct Wines tool ('GMS') built on the underlying framework used in Unilever's PROMIS tool, but enhanced it with a wealth of functionality relevant to multichannel retail. It also replaced the original Windows front end with a web-based interface, making it more easily accessible to multiple users across the world. With around 100 active users across four geographic areas, GMS is now an integral part of their business, providing support to Marketing, Finance, Merchandising and Operations as well as the board. It has freed data analysts to spend more time on difficult questions and allowed marketers to focus on the task of engaging with customers.

The success of both systems, combined with the knowledge that neither Unilever nor Direct Wines had been able to locate anything suitable off the shelf, suggested that there could be a demand for such a tool amongst other companies that wish to take their marketing more seriously. However,

both these companies were already Oracle users, able to host and support the underlying Oracle database critical to the platform. To make deployment as simple as possible for other organisations without in-house Oracle skills, we therefore decided to develop a fully cloud-based solution.

This has now been launched as Compas, and makes the sort of bespoke marketing and operational capabilities described above available more widely in a highly cost-effective manner. The result is that businesses now have access, at a very reasonable cost, to a fully hosted and supported suite of enterprise-level tools designed specifically to support the marketing function. Furthermore, our cloud-hosted approach has also simplified deployment and still affords organisations the flexibility of tailoring screens and calculations to suit their business model.