

Personal information management platform Features and modules





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Introducing CASSIE

Personal information management platform

Personal data compliance simplified

Turn cumbersome personal information management into a sleek, positive brand experience and an opportunity to increase conversion rates using CASSIE's suite of features.

Create a seamless customer experience

Every customer journey is different. CASSIE allows for complete customisation of this process, integrating seamlessly with your existing systems and websites.

Reduce the cost of information requests and audits

As a single point of truth for personal information and contact preferences for staff, leads, and customers alike, CASSIE takes the resource intensive elements out of time-consuming Subject Access Requests and other information requests.



Core features

Flexible integration

With comprehensive integration via APIs or file-based transfers, the platform can meet all of your integration requirements seamlessly.

Creative web widgets

Web widgets display consent options automatically and can be embedded into any web properties that you own, such as newsletters, blogs and webforms. Quickly and easily add text and images to make consent an interactive experience.

Dynamic statement A/B testing

The only platform which allows A/B testing. Your marketing team can test to drive up consent with high-performing statements.

Granular level consent

Do away with blanket opt-ins and opt-outs. Offer opt-in by channel, by topic: be as granular as you like to increase acquisition and retention.

SARs and FOI request management

Save time and internal resource with the ability to export data quickly to facilitate Subject Access Requests and Freedom of Information requests.

Complete consent audit history

Every interaction, complete with statements, channels, dates and times is audited, providing a single view at an individual level. Never worry again about providing proof of consent.

Preference holiday

Customers can take a break from receiving communications from any or all of your marketing channels. Let them manage exactly what they receive (and when) to improve engagement in key channels and reduce unsubscribes.

Email links

Statement level links are generated to be included in email communications. Once clicked, the customer's subscription preferences are automatically updated within CASSIE. No login is required, making this an easy to deploy and highly effective consent process. A common example is an unsubscribe link.

Dashboard & live reports

Real time dashboards deliver useful insights into your client consent profile. Get clear visibility of high performing statements at the click of a button to optimise your organisation's marketing efforts.

Admin portal

Complete customisation and configuration of CASSIE is achieved via the admin portal. Marketing resource can deliver customised forms, widgets and emails. Consent statements can be created quickly and easily within the portal.

Secure hosting

Never worry again about your data security. Hosted on Amazon Web Services, we are the only business in the UK to have Government level security accreditation for our cloud solution. We're white-listed by AWS and cleared to provide extensive services to UK Government.

Inclusive core platform updates

Our platform continually evolves with one core code base. We update on a monthly basis in line with customer feedback/requests, with two core updates each year on our strategic roadmap.

Optional extras

International & multilingual

Deploy multilingual customer-facing portals. We have users with as many as 22 languages but the platform allows for unlimited expansion of this feature.

Multi-brand & multi-label

Manage multiple brands within CASSIE easily and transparently. Data can be labelled by brand, enabling flexible deployment.

CRM integration

As a cloud-based platform, CASSIE integrates seamlessly and securely with your CRM. Onboarding is quick and straightforward.

eSP & marketing automation

Export data via API or bulk data extract to sFTP to allow powerful interface with your email service provider (eSP) or marketing automation platform. Fast, easy and secure.

API webservice query & post

CASSIE has a powerful application platform interface (API). This provides the capability to push and pull data into other application platforms, making CASSIE a hugely cost-effective method of enterprise preference management.

Single sign-on

With full integration to Active Directory Federation Services (ADFS), our single sign-on feature simplifies the customer journey from end to end, thus removing barriers to consent.

VPN tunnel

Additional security can be delivered by VPN tunnelling if required.

Table of features

Key

✔ Standard

✔ Optional

	CASSIE Nano	CASSIE Plus	CASSIE Premium	CASSIE Professional	CASSIE Enterprise versions
Customer base up to	10,000	50,000	250,000	750,000	1,250,000+
Flexible integration	✔	✔	✔	✔	✔
Creative web widgets	✔	✔	✔	✔	✔
Dynamic statement A/B testing	✔	✔	✔	✔	✔
Granular level consent	✔	✔	✔	✔	✔
SARs & FOI requests	✔	✔	✔	✔	✔
Complete consent audit history	✔	✔	✔	✔	✔
Preference holiday	✔	✔	✔	✔	✔
Email links	✔	✔	✔	✔	✔
Dashboard & live reports	✔	✔	✔	✔	✔
Admin portal	✔	✔	✔	✔	✔
Secure hosting	✔	✔	✔	✔	✔
Inclusive core platform updates	✔	✔	✔	✔	✔
International & multilingual	✔	✔	✔	✔	✔
Multi-brand & multi-label	✔	✔	✔	✔	✔
CRM integration	✔	✔	✔	✔	✔
eSP & marketing automation	✔	✔	✔	✔	✔
API webservice query & post	✔	✔	✔	✔	✔
Single sign-on	✔	✔	✔	✔	✔
VPN tunnel	✔	✔	✔	✔	✔



At one NFP, 26% of contacts intending to unsubscribe from emails chose to remain in contact after being given more control over their communication preferences with Syrenis CASSIE.

Expanding CASSIE

We have a suite of additional modules which expand the functionality of CASSIE into other touchpoints of marketing data and privacy management.

Bolt them on as your organisation needs to create a single central point for data and preference management. Collect, update, store and sync data more efficiently than ever using these modules.

Customer service portal

Portal for real-time management of preferences by customer service, call centre or sale teams



Got an in-house team taking calls from customers who want to update their information or contact preferences?

Add a customer service portal to your CASSIE platform to empower your teams to update records in a matter of seconds. Be responsive to customer requests whilst keeping everything accurate and in sync.



Empower teams to manage preferences

Give your teams access to your consented database via a customer service portal. Using an easy and powerful search function, your operatives can find, view and update a customer's consent history in a few quick clicks.

Configure to your requirements

You decide which fields are visible to operatives and which ones can be edited, giving them access to the exact information they need whilst protecting important or sensitive data from being overwritten or viewed without authorisation.

Quickly manage Subject Access Requests

Give your teams access to the information that they need to fulfil Subject Access Requests well within the month's response time required under GDPR.

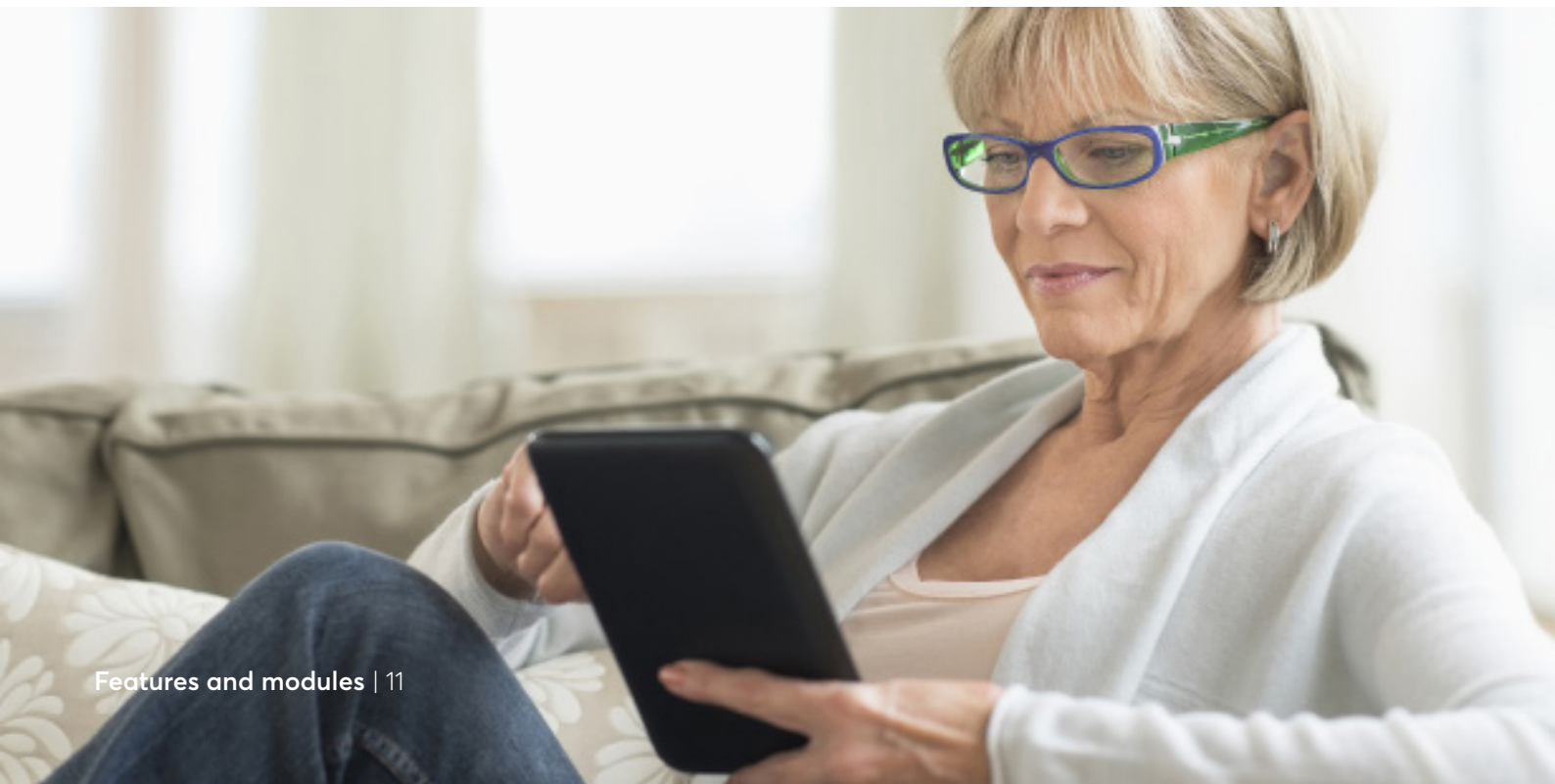
Public portal

Branded interface for self-management of preferences



Nothing builds trust like empowering your customers and contacts to manage for themselves how they would like to hear from you.

Expand CASSIE to allow your customers to manage their own details in an easy to use and fully brandable interface which feeds the updated information directly back into CASSIE.



Put your contacts in charge of their preferences

A public portal frees up your internal teams to do what they do best, maximising your productivity, by letting your contacts manage their own preferences in a password protected portal.

Configure to ensure appropriate data control

You have full control over what users can edit within their portal. Allow them to update their own contact information or simply manage their marketing channel opt-ins.

Fully brandable

The portal can be configured and customised to ensure that the experience of managing personal data and preferences feels familiar and seamless for your customers.

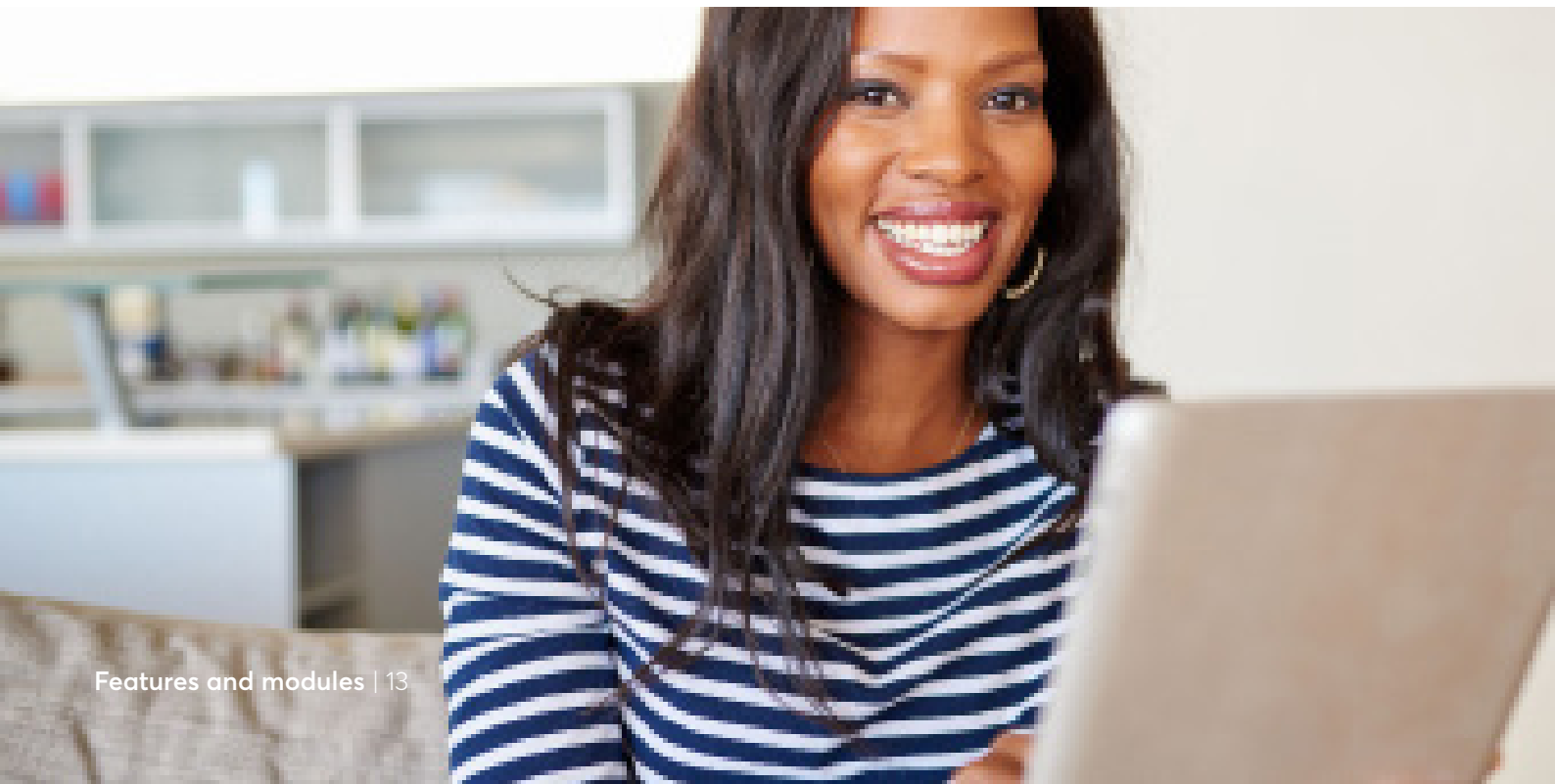
Cookie management

Easy-to-use cookie management



Traditional cookie solutions are difficult and time consuming to set up correctly because they require knowledge of tag managers and scripting. CASSIE's solution is different.

This module is designed to be user-friendly and easy to implement. It makes cookie compliance under PECR and GDPR straightforward for your brand: no tag management expertise required.



True cookie compliance made simple

Regain control of the cookies on your site. Publish only cookies that you approve, and protect against cookie stuffing with regular scanning. Allow users to accept, decline and change their minds about specific cookies in line with PECR and GDPR.

Customisable with pre-made templates

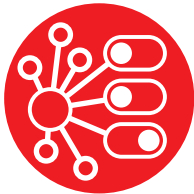
Keep brand consistency with fully customisable widgets. Choose the wording, styling and animation of your cookie widgets to give visitors an experience which reflects your brand seamlessly. To help you get up and running quickly, we provide customisable templates with pre-built CSS classes, whether you want a pop-up or a pull-down.

Multilingual and multi-brand

Widgets can be created in multiple languages and for different brands, making this solution ideal for organisations which operate across the globe or who run several brands simultaneously.

Advanced data

Advanced data collection and organisation



Currently managing data collection such as enquiries, registrations, claims and promotional entries through disparate, unconnected forms?

Do away with the fuss of downloading endless CSVs from basic forms: collect, centralise, segment and augment data using this module, paired with consent data if required. Push incoming information out to your other systems as needed.



Flexible, centralised data collection

Shake off the restrictions of isolated forms. Automatically pull information from multiple forms into central data lakes where it can be reconfigured to suit your business requirements. Enhance with metadata for even more powerful applications such as AI or machine learning. Get ready to leapfrog your competition with partially trained AI coming to CASSIE in 2019.

Push segmented data into different systems

Pre-define rules to push details collected from specific web forms automatically into your other systems, such as CRM or business intelligence platforms, on a schedule that you define.

Reconfigure your historical data at any time

If your requirements change or you wish to alter the way that you are grouping collected data, quickly and simply create new data lakes based on the criteria that you select.

Your requirements

Core features

- | | | |
|---|--|---|
| <input checked="" type="checkbox"/> Flexible integration | <input checked="" type="checkbox"/> SARs & FOI requests | <input checked="" type="checkbox"/> Dashboard & live reports |
| <input checked="" type="checkbox"/> Creative web widgets | <input checked="" type="checkbox"/> Complete consent audit history | <input checked="" type="checkbox"/> Admin portal |
| <input checked="" type="checkbox"/> Dynamic statement A/B testing | <input checked="" type="checkbox"/> Preference holiday | <input checked="" type="checkbox"/> Secure hosting |
| <input checked="" type="checkbox"/> Granular level consent | <input checked="" type="checkbox"/> Email links | <input checked="" type="checkbox"/> Inclusive core platform updates |

Choose your optional extras

- | | |
|---|--|
| <input type="checkbox"/> International & multilingual | <input type="checkbox"/> API webservice query & post |
| <input type="checkbox"/> Multi-brand & multi-label | <input type="checkbox"/> Single sign-on |
| <input type="checkbox"/> CRM integration | <input type="checkbox"/> VPN tunnel |
| <input type="checkbox"/> eSP & marketing automation | |

Need expansions for marketing or data management functions?

- | | |
|---|---|
| <input type="checkbox"/> Customer service portal
Empower teams to manage preferences | <input type="checkbox"/> Cookie management
Manage cookie permissions easily |
| <input type="checkbox"/> Public portal
Put your contacts in charge of their own preferences | <input type="checkbox"/> Advanced data
Collect, segment and sync data centrally |

How many contact records do you have?

- | | |
|---|---|
| <input type="checkbox"/> Nano: up to 10,000 | <input type="checkbox"/> Enterprise: up to 1,250,000 |
| <input type="checkbox"/> Plus: up to 50,000 | <input type="checkbox"/> Enterprise Plus: up to 2,500,000 |
| <input type="checkbox"/> Premium: up to 250,000 | <input type="checkbox"/> Enterprise Premium: up to 5,500,000 |
| <input type="checkbox"/> Professional: up to 750,000 | <input type="checkbox"/> Enterprise Professional: 5,500,000+ |

Contact us

Want to arrange a demonstration or discuss your requirements?

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