



CASE STUDY

Engineering SAVI: An Agentic AI Marketing Intelligence Platform

Organisation Profile

The client is a marketing technology innovator running planning, execution, measurement, and budgeting across more than 15 disconnected systems — CRM, ad platforms, finance and ERP tools, and spreadsheets. Leadership needed a single, real-time view of what marketing spend was delivering, and the ability to move budget to what was working without waiting weeks for reports.

Industry

Marketing Automation

Results

Planning cycle reduced by up to

87.5%

Budget reallocation time reduced by up to

95%

Attribution speed improved up to

30x



Business Problem:

Planning a single campaign cycle consumed 14 to 16 weeks of manual spreadsheet work, attribution reporting lagged 30 to 45 days behind reality, and budget variance of up to 4% meant millions of dollars in unexplained spend. Market conditions could shift in days, yet reallocating budget still took weeks. The engagement focused on unifying planning, execution, measurement, and budgeting into one AI-native platform with a single source of truth.

Challenges:

- 15+ disconnected systems with no unified intelligence layer.
- 14–16 week planning cycles driven by spreadsheets.
- Attribution lagging 30–45 days behind spend.
- Budget variance of up to 4%.
- Budget reallocation taking weeks, not hours.
- Marketing and finance reconciling different versions of the truth.

Solution:

- Ran a structured discovery across marketing, finance, and operations to map the real decision loop — how plans were made, how budgets moved, and where attribution broke down.
- Designed SAVI as an Artificial Specialized Intelligence (ASI) platform that unifies Plan, Execute, Measure, and Optimize against one shared source of truth, integrated with the existing stack with no rip-and-replace.
- Built a five-layer agentic architecture of 17+ specialized agents — orchestrator, mode and domain agents, specialists, workers, and validators — so work is orchestrated rather than ad hoc.
- Made Bayesian marketing mix modelling (PyMC) the default fabric for every budget decision, so recommendations carry 95% credible intervals instead of point estimates.
- Replaced the 30–45 day attribution lag with real-time multi-touch attribution, and the month-end close with continuous, sub-minute reconciliation.
- Delivered on Databricks (Delta Lake, Unity Catalog, Spark) with the Claude API, LangGraph, GraphRAG, and MCP, with security and governance built in from day one.

Business Benefit:

Within a quarter of production launch, SAVI cut planning cycles by 87.5% (14–16 weeks to about 2 weeks), reduced budget reallocation time by 95% (weeks to hours), and moved attribution from monthly to real time, a 30x improvement. Budget variance improved from 4% to under 2%, and 300+ hours a year were reclaimed from data gathering and reconciliation. The platform carries a projected 3-year ROI of 520% across 11 end-to-end user journeys. Marketing and finance now work from the same numbers, so questions that began with “we think” are answered with “the data shows.”

Key Stakeholders:

- CMO and Marketing Leadership
- Regional Marketing Directors
- Campaign Managers
- Finance Team
- Client IT and Data Teams
- Predikly Engineering Team

Security & Governance:

Because SAVI touches budget authority and customer data, governance was built in from the start: OAuth 2.0 and SAML SSO, role-based access control via Unity Catalog, AES-256 encryption at rest and TLS 1.3 in transit, a two-layer AI guardrail system with automatic budget limits and confidence-score requirements, and a human-in-the-loop approval matrix. The platform aligns to ISO/IEC 42001 and the NIST AI Risk Management Framework, with audit lineage retained for seven years.

Path to Transformation:

- **Discovery:** understand the ecosystem, define success metrics, identify quick wins.
- **Develop:** connect existing systems, let the AI learn the client’s data, deliver first insights.
- **Pilot:** go live with a pilot team, measure early results, refine and expand.
- **Deploy / Scale:** full team rollout, all integrations live, enterprise readiness, full ROI realised.



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