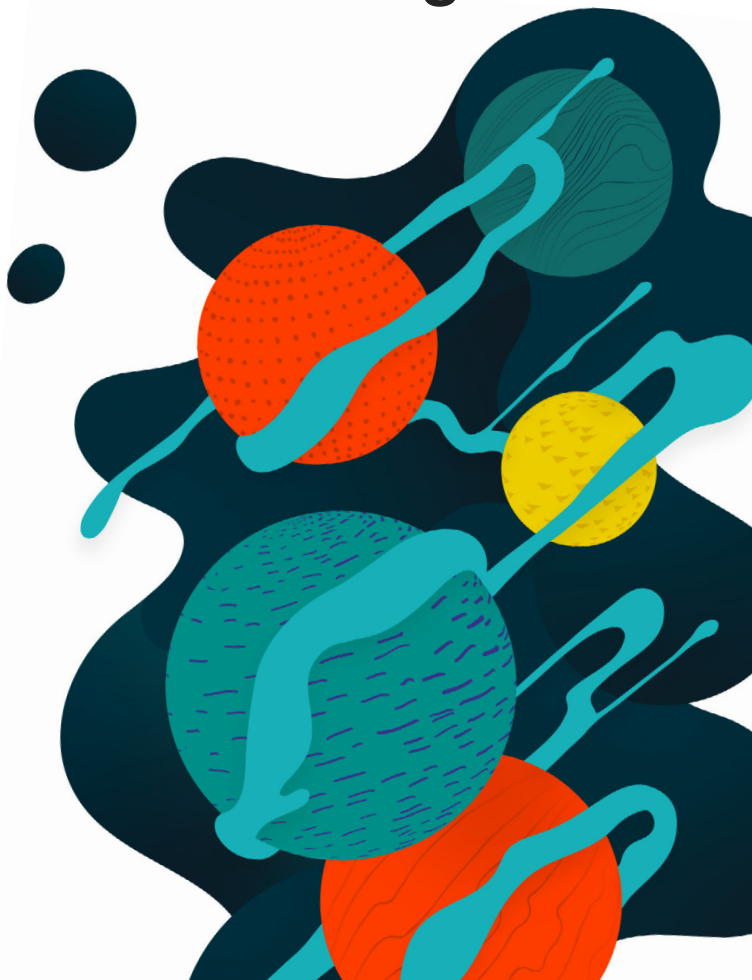




EXPERIENCE ESSENTIALS

# Building connected experiences in the era of algorithmic marketing.



EXPERIENCE  
ESSENTIALS  
● Marketing

# Just the basics

**W**hen you're learning a new sport you know there are nuanced rules and strategies that long-time veterans understand. But if you're getting started it's best to keep things simpler. You need a strong understanding of the fundamental basics.

There is a similar "basics only" approach to becoming an experience business. In our multi-part Experience Essential series, we examine the basics of customer experience (CX)—the building blocks you'll want to have in place to sustain customer experience management (CXM) success.

In this installment of the Experience Essential series, we help you get a sense of what a good, connected marketing experience looks like. We show you what cross-channel marketing should look like, the players that help create a better connected experience, and what you can do to knit your customer experience together more tightly.

## **The customer experience**

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Customer experience management (CXM) is the leading edge of marketing, sales, and branding today. It goes beyond CRM which shows customers in the past. CXM shows what customers need right now, and in the future, and delivers it in real time, at scale, across every channel.

# The challenge of connected experiences

One morning in early January, Alice walked into a shoe store in Los Angeles to try on a pair of running shoes. It was her New Year's resolution to train for a 10K charity race. For weeks, the red shoes had followed Alice around the internet after she "liked" them on Instagram. Now she was finally ready to pull the trigger. But when Alice arrived home with her brand-new shoes, something annoying happened. An email arrived in her inbox encouraging her to buy the sneakers online. It offered a 20 percent discount.

Meanwhile, across town, the sales and marketing team at Vidz, a video-conferencing company, was pursuing an influential buyer, Tony. He works for a media company with offices around the world. The account could be worth millions. Jake, a top salesman at Vidz, scrolled through Tony's Twitter account and noticed that he's a huge golf fan. "I can't believe I'll miss Tiger signing copies of his book this weekend," wrote Tony. So Jake quickly arranged for a signed copy to arrive at his desk before he returned. Tony was overjoyed. He called the Vidz team to thank them—and discuss his video needs.

In a world where algorithms, artificial intelligence, and personalized messaging are taking over marketing, how do B2B and B2C marketers make customers feel cherished, like Tony, and not frustrated, like Alice? Michael Kringsman, an industry analyst and digital thought leader, says that when personalization is done right, the emotional response is positive. "But on the other hand, you have to be careful because it's a delicate balance. You don't want the customer to think, 'Oh, everywhere I go on the web, this company is stalking me with this stupid product.'"

By unifying marketing operations and powering omnichannel campaigns with data and analytics, marketers can send the right message to the right customer at exactly the right time—at scale. Marketers call this campaign orchestration. Yet only half of brands are using a marketing platform like this, estimates Adrienne Whitten, director of product and segment marketing at Adobe. “The other half of the world has still to discover it,” she says. It’s one of the keys to mastering today’s complicated customer journeys. People use email, they visit trade shows, they search the web to research products on mobile phones, tablets, and desktops. “People are not single-channel anymore,” says Whitten.

Most marketers today are used to having a portfolio of dozens of different solutions to power all aspects of their work. But siloed solutions create situations like Alice and her sneakers. The answer is a full stack of solutions, all working together to carefully match and manage the customer journey. For B2C marketers that means the power to plan, design, launch, and automate cross-channel experiences throughout the customer lifecycle. And for B2B marketers, it’s the ability to build long-term relationships with buyers who face long and complex buying decisions, as well as those who are researching higher-stakes purchases, like expensive video-conferencing software.

## Talk the talk

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### **Algorithmic marketing**

The use of data, machine learning, and AI to automate the customer experience and personalize it at an individual level. It allows businesses to deliver the right message in real time and at an enterprise scale.



According to Forrester Consulting, adoption of technologies to help marketers deliver on these expectations is poised to nearly double this year:

		<b>Cross-channel campaign management technology</b>	<b>Marketing automation technology</b>
<b>Current adoption level</b>	B2B	35%	40%
	B2C	32%	38%
<b>Planned adoption growth over next year</b>	B2B	+ 34%	+ 27%
	B2C	+ 30%	+ 27%
<b>Adoption level in one year</b>	B2B	69%	62%
	B2C	67%	65%

Source: Forrester Consulting

Marketing automation and campaign management is like riding a bike with no hands—it can feel exhilarating, but you need to pay attention. In an ideal world, messages are automatically sent to prospects who are ushered along the sales funnel. Social media posts are published on a schedule while customer behavioral data feeds the marketing machine, making it even more accurate. All the while, marketers can focus on other aspects of business—the creative stuff.



*"Marketers can spend less time on the gritty details, like writing code, tracking down IT, trying to interpret reports, and more time being strategic."*

**Bruce Swann**

Group Product Manager, Adobe Campaign

To make life even easier, marketers should consolidate toward a full stack of martech solutions, including analytics, personalization, measurement, and orchestration. Together, these tools can power faster and better segmentation, more relevant and timely messages and content, and make overall decision-making easier across complex marketing campaigns.

This guide will show you how to get started putting it all together so that you can attract the right prospects and convert them into loyal customers.

# Getting started

## Email automation

To deliver automated content that is timely, personalized, and hyper-relevant to your buyer, you need to start with accurate customer data. "You have to know where the customer is in their journey, and what they're doing," Whitten says. "There's personalized, and there's hyper-personalized. If I just clicked on an ad, and I downloaded a white paper, I don't want to keep getting emails that say, 'Please download this paper.'"

If a lead is in the middle of a sales cycle, and they're having deep conversations and demos with a sales team, they need different types of content that complement their particular stage of the journey. "You can tell all that from their digital footprint," says Whitten. If you don't have the right tools, it's simply impossible to do this type of marketing at scale.

Swann explains how analytics can boost the effectiveness of a B2C email campaign: "A customer could open an email in LA, and that's a totally different context to one they might receive in their home office in New York." In Los Angeles, there might be an opportunity to promote an offer specific to the location. "That's cutting edge," says Swann, "but in



70%

of emails are opened  
on a mobile device

this mobile world that we live in, 70 percent of emails are opened on a mobile device. Now there's the ability to include interactive elements in an email—like when you get out of an Uber, and you get an email right away, and you can rate your driver with one to five stars.”

### **Journey orchestration**

To build long-term customer engagement, you need journey analytics plus centralized orchestration. Start with consolidating data from trade show visits, website clicks, and other third-party data. “The more data you can bring into a centralized system, the smarter it becomes,” says Whitten.



*“The ultimate goal is a 360-degree view of your customer, one that’s developing in real time.”*

**Adrienne Whitten**

Director of Product and Segment Marketing, Adobe

Imagine that a new lead arrives at the website of an online payments company. They read a blog post about preventing fraud, then download a white paper about the future of mobile payments. A strong marketing platform can extract information about that customer’s interests and needs. It can even change the website on the fly. “We can serve up specific

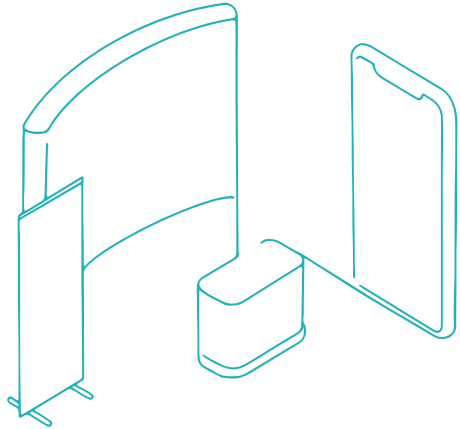
content that reflects those interests and is more likely to convert,” Whitten says.

Swann describes another example of dynamic content. “When Adobe customers like Virgin Atlantic or Virgin Holidays know you’ve booked a flight, trip, or vacation package and the trip date is getting near, they send messaging driving incremental revenue, like an upgrade to first class, or other ways to improve the overall customer experience. They are able to accomplish a lot of that through orchestration. It’s all about building excitement. It’s a part of their experience.”

### **Online and offline integration**

Even in today’s digital world, no business should abandon offline lead generation tactics, like networking, trade shows, and other in-person marketing. To create a truly omnichannel experience, companies need to bridge the gap between online and offline marketing. “Even offline touches

have a digital footprint,” says Whitten, “so we try to incorporate all of that information.” For example, at a trade show, you may gather data showing who has viewed a demo or who attended a breakout session on your latest product. With the right system, you can integrate that with other sources of data, giving you a broad profile of each person. Of course, what you do with that data is what matters.

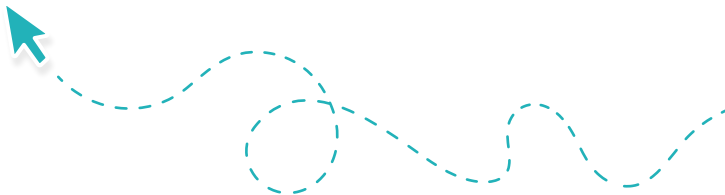


The important part is how to interpret this data, according to Krigsman: “I dislike the term ‘unique identifier,’ because we’re talking about a person. We’re not talking about a number or a robot—we’re talking about an individual. But a number of great things can happen when a person has an in-store and online experience. Because of my shopping history, which includes both online and offline, you know me better, and now you can send me a variety of different offers that make sense. You know the kind of products that I like, and you even know my size and you know what I’ve rejected. Now you can tailor those offers to me and get me hooked.”

## **Finding the balance**

Why don’t all companies focus on that personal touch? Why don’t more brands spend their marketing dollars on personalized outreach, like sending an autographed book to a lead? “One word: scale,” says Whitten. If you don’t have the right tools, it’s simply impossible to do this type of marketing at scale. You’d need an army of staff to manage every campaign. With the right machine learning and AI tools, you can target customers at scale.

“With all you know about somebody, there’s a danger of using it in a way where it’s invasive or creepy,” says Swann. “I always tell people in workshops, ‘Just because you can doesn’t mean you should.’ Let’s say you click through from an email to a website. You don’t want to get that remarketing email two seconds later. To me, that’s creepy.” Swann says that Travelocity does this well, where they have a science behind their remarketing efforts that drives optimal results. “They don’t want to do it immediately, where it’s disruptive or it’s creepy.”



“Number one is the perspective of human judgment,” adds Krigsman. “As we design our customer journey, we must develop authentic and genuine empathy. We need to project ourselves into the shoes of the customer at each point in their journey. You really want to encode human empathy inside the algorithmic offer machine.” Empathy can be the difference between genuinely understanding the customer’s needs and being perceived as stalking them.

## **Integrating with full stack**

There are many martech frameworks available as there are options for point-to-point integrations. Whatever tools you have, the more interlocking and seamless you make your data flow across the entire customer lifecycle, the better experience you will be able to offer.

Depending on priorities, *delivery* may be your first choice, which means ensuring your earned, owned, and paid media are personalized and orchestrated. Second, *content* may be critical—so a content management system (CMS) will let you create and manage dynamic digital content, forms, and entire experiences. Third, data from your automation or campaign orchestration tool will give you one view of customer data, but enriching it with online analytics and a data management platform (DMP) can help you identify behavioral segments to improve the overall customer journey, while increasing conversion, account quality, and digital media ROI.

Ultimately, in the future, expect platform-based centralized customer and account profiles that will bring together all behaviors, traits, and attributes (both first- and third-party) in one location. So rather than integrating point to point, you would only integrate with the platform.

# The players—who's who

According to Veronica Holmes, a senior business consultant for Marketo Australia, one of the biggest challenges facing companies starting their marketing automation journey is how to prepare their business and teams for the changes ahead: "Planning rollout and training strategies, building systems integrations, updating websites, planning and developing content, cleaning data—these can all be critical tasks in the early days of implementation." So you need the right people on board from the very beginning.

## Here are the main players:



### **VP of digital marketing**

aka: digital strategist, digital innovator

Functional role: the marketing scientist

This digital decision-maker is in charge of executing digital strategy and transformation. They are continually looking for new ways to reimagine workflows and free up more of their team's time for more exciting ventures. It's their job to evaluate the latest technologies, and they're known as a thought leader in all things digital.



### **Sales leader**

aka: sales director

Functional role: the sales leader

The sales leader has global responsibility for all teams, including direct sales, customer success, business



development, enablement, and sales operations. They're an advocate for building a unified stack of solutions that will revolutionize the sales funnel and boost the lifeblood of their company: sales figures.



### **Marketing operations manager**

aka: marketing practitioner

Functional role: the executor

A marketing practitioner is laser-focused on designing and executing a brand's lead management process, including marketing databases and marketing automation solutions. They're also in charge of tracking the performance of automated marketing systems.



### **Chief information officer**

aka: CIO

Functional role: the IT boss

CIOs are in charge of finding the latest and greatest technologies, selecting the right solutions and how to make them work. The CIO knows that piecing together legacy software to create a unified customer view is painful and ineffective. They know that the perfect solution often involves a number of disparate products and solutions working together in perfect harmony.

# Meet the automation pioneers



## **Travelocity**

The online travel company is especially effective with hyper-personalized emails. They learn about their users from their previously browsed destinations, trips, and abandoned itineraries. If a user toyed with the idea of flights to JFK and a hotel in Manhattan, they can send a personalized email with the latest Big Apple offers. Based on the day a customer books travel, Travelocity can even guess if you're traveling for business or leisure.



## **Charles Schwab**

As a financial services company, one of Schwab's business goals is to attract new financial advisors. Schwab uses emails, trade shows, and a centralized orchestrated system to do it. If a financial advisor visits the Schwab site and downloads a white paper on Monday but visited again on Tuesday, Wednesday, and Thursday, they can still track the user's behavior using an IP address and start to build a picture of the broker. Schwab will know what follow-up information to send and how best to set up a conversation.



## **John Hancock**

This well-known U.S. insurance company wanted to speed up their ability to deliver quotes to customers. They decided to take out the human middleman. John Hancock integrated their customer forms into their campaign orchestration platform, where algorithms and risk assessment now measure potential leads. That information is delivered to a salesperson, who will then contact the customer to discuss their insurance needs.

# Streamline the customer experience

**M**oving toward a full-stack or all-in-one solution covers all the needs for omnichannel orchestration, content, personalization, analytics, and measurement. By applying analytics to data, you won't just understand who your customers are, you'll learn how and when to engage with them—and delight and convert them.

When automation is done well, customers feel cherished and understood, building a beautiful relationship between buyer and brand. Imagine knowing who will open the email with subject line A or B, or if they'll click the blue or red CTA. Machine learning and automation can streamline your whole campaign, empowering marketers to deliver irresistible messages at the perfect time.

Learn more about how you can start connecting your martech stack to achieve higher ROI.

[Get details](#)

## Sources

*"B2B and B2C Companies Face Similar Hurdles with Complex Buyer Journeys," Forrester Consulting, commissioned by Adobe, May 2019.*

Veronica Holmes, *"5 Vital Strategies for a Successful Marketing Automation Implementation," Marketo Blog.*



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