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- 4 elements of a holistic multichannel marketing strategy
- 3 brands use multichannel data for targeting and engagement
- 13 marketers sound off on multichannel trends

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“Brands that fail to develop a content strategy will find themselves in a very lonely place as social engagement fails to happen.”

-- Jake Sorofman

Gartner Inc.
’Channel Strategy

Call it what you will, multichannel is about strategy

The concept of multichannel marketing should be straightforward: using multiple channels in concert to attract and engage customers and move them through the marketing funnel. It seems, though, that some marketers simply use multiple channels, not cohesively at all, and call it multichannel marketing. If you define it literally, it is. But that definition just doesn’t fly for marketers who aim to take a truly cohesive, impactful approach.

So instead, some marketers use integrated marketing or cross-channel marketing as the name for their holistic approach to marketing. Others, especially retailers and the technology companies that serve them, have taken to using omnichannel in reference to taking a seamless approach to marketing (and retailing) across multiple channels.

Having four monikers for one activity is overkill in my opinion, but I understand the rationale. The goal is to steer “errant” marketers toward cohesion. More important than what you call it, though, is the strategy itself. The strategy “should” be to engage customers across channels in a unified way: Elements like messaging, timing, targeting, pricing, promotions all acting in concert to capture customers in their preferred channel at the optimal moment. But often, new channels come along and function in silos. Or specific promotions focused in one channel get no support from other channels.

It’s all about the data

What’s more, the data created from customers’ responses and actions “should” be cycled back into the various analytics, CRM, and marketing automation tools so marketers can draw on the information to make improvements to their communications and campaigns. The challenges here include functional and data silos, as well as the lack of tools or analytics capabilities necessary to make a closed loop a reality.

Although difficult, these tasks are not impossible. As you’ll read in “Traditional Marketing Gets Charged Up” (page 10) and “Channeling the Customer” (page 14), companies like HealthNow, Johnny Cupcakes, and Regus have the people, processes, and technologies in place to take a truer, more holistic multichannel approach to marketing. Indeed, they’re also using data from individual channels to help improve the performance of other individual channels, as well as multichannel efforts overall. By combining email, social, and purchase data, for example, Johnny Cupcakes improved its email targeting so effectively that it saw a 141% lift in sales among one customer segment. Another benefit is the gains in customer loyalty brands can achieve when they do multichannel marketing well (see “Multiple Channels, One Customer Relationship,” page 19).

Regardless of whether you call it cross-channel, integrated, multichannel, or omnichannel marketing, the ultimate goal is the same: to orchestrate what could be discordant channels so they play in harmony, captivating customers with their synchronous melody.
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Marketing Gets Holistic

4 elements of a truly multichannel marketing strategy

By Phil Britt

Multichannel marketing should be more than marketing using multiple channels at the same time. It should be a holistic approach to using several channels cohesively and in tandem to communicate with customers where and when they prefer, with relevance and in context.

“One thing that we’re starting to see is a mind shift to start thinking about the customer in the center” of the marketing effort, says Trip Kucera, senior research analyst of marketing effectiveness and strategy at research firm Aberdeen Group. “We’re starting to understand the buyer at a more granular level. In the current context of real-time channels, a segment of one is starting to get some legs.”

The customer segment of one, or even a highly select group for businesses that don’t have the sophisticated analytics to drill down to microsegments, increasingly provides the basis for many multichannel marketing efforts today. Companies need to collect information from an ever-growing number of touchpoints, including social media, contact center feedback, surveys, and the like to develop a comprehensive, multichannel marketing campaign, according to Kucera.

The multichannel marketing campaigns of today are much more fluid and fast paced than campaigns of just a few years ago, adds Kucera, who likens the nearly on-demand multichannel marketing efforts today to the just-in-time concepts popularized in production environments.

“Marketers are getting rid of having an inventory of marketing materials and are assembling more on the fly. They’re getting rid of batch campaigns and are responding in a more agile fashion,” Kucera says. On average, leading companies refresh their predictive models 36 times a year, compared to only 10 times per year for companies that Aberdeen classifies as followers.

The only way to produce those campaigns in a more comprehensive manner is to ensure that company leadership fosters cooperation among marketers inside and outside of the company, and there’s technology in place to support that collaboration. According to Kucera, 80% of marketing efforts are typically handled by parties outside of the company. So, to be effective, companies need to centralize their marketing collateral and messaging, while organization leaders need to ensure that marketers follow company directives regarding collaboration and unified marketing efforts.

Now more than ever a holistic customer strategy should take into account the different channels that customers prefer to use for different interactions. Some will respond to social media messages, while others will respond more to Internet or even direct mail marketing efforts.

However, Kucera cautions that some of the measurement models used to determine the most effective channel, or the channel that should be credited with a sale, should be reevaluated. Some models provide most or all of the credit for the sale to the last channel of contact. But that doesn’t take into account other marketing messages that may have also influenced the decision. For example, a prospect may respond to an email after becoming predisposed to buy from information he saw on the company’s website, in social media reviews, or via a direct mail piece.

In response to customers’ expectations for relevant communications in their preferred channels, marketers need to create, execute, and continually improve their own holistic, multichannel approach to marketing. Here are four elements that will help them to do so:
1. Integrated customer data

To be effective, multichannel marketing has to consolidate different identities for the same person, while recognizing the separate identities of people who share the same or similar names.

“A person might use one identity on Twitter, another on Facebook, and another in another channel,” says Deb Woods, VP of product marketing for customer interaction management at analytic data solutions provider Teradata. “You have to have the tools in place to be able to compare the names, addresses, and phone numbers to see if you’re dealing with the same person.”

To ensure that a company is collecting and fully integrating customer data efficiently:

- Collect data from all touchpoints, including social media, help desk interactions, white-paper downloads, and surveys, as well as from nonmarketing sources such as payments, sales, and legal information.
- Use a data warehouse and data mining tools to store customer data so that it’s accessible for marketers and other business units in the organization.
- Use tools that can combine structured data like surveys and customer transactions, along with unstructured data like comments from social media and contact center interactions.
- Ensure that all of the data for individual prospects and customers is correct. Use data cleansing to eliminate incorrect prospect and customer information.
- Deploy consistent branding across different channels. While the smaller form factor of a mobile device doesn’t allow for the same details that might be delivered in a print ad or on the radio, the message should be similar in tone and feel.

2. Collaboration and coordination among marketing teams

Just as the information has to work together, so too do the people using that information. While one person or team might have extensive expertise in social media, and another may have worked closely with print, they can’t operate in silos if the multichannel marketing campaign is going to be effective.

“You need to have people who drive the strategy and people who drive the intelligence,” says Bryan Pearson, president and CEO of loyalty and marketing programs provider LoyaltyOne. “You need to make sure that you have tools that encourage the sharing of information that helps the different parts of the organization to align.”

Company leadership also needs to develop a strategy that encourages different areas of marketing and other departments within the organization to work together.

Other top recommendations to foster collaboration and coordination among various marketing teams include:

1. Centralize the workflow of the marketing team. Share marketing collateral, assets, and messaging details.
2. Use integrated tools to track customers’ channel usage, spending habits, preferences, and related information to provide a holistic customer view. It’s also important to ensure that the tools are accessible to all the appropriate departments.
3. Use preapproved elements for marketing messages, allowing changes for items like location, but not in the overall tone and feel of the message itself.
4. Communicate the effectiveness of a multichannel marketing program to all involved marketing staff using internal performance and external benchmark data.

“We’re starting to understand the buyer at a more granular level.”

Trip Kucera
Aberdeen Group
3. Holistic customer strategy

A holistic customer strategy should include elements of traditional marketing, public relations, loyalty programs, and customer service to support both customer acquisition and retention.

“Focus on the lifetime value of the customer,” says Pelin Thorogood, CEO and a board of director at business intelligence and analytics provider Anametrix Inc. “Understand their patterns and interactions with the brand. You want to turn the prospect into a buyer and then into a repeat buyer.”

The customer strategy needs to incorporate different elements while avoiding potential pitfalls: *Don’t limit* customer data to the marketing department. Sales, product developers, and others within the company can glean valuable information from this data, as well. Similarly, departments outside of marketing might have information that will help in formulating a holistic multichannel marketing plan.

**Do make** the right offer in the right channel, based on customer preferences. Some marketing messages will be more effective in one channel than another. But different channels can add incrementally to the decision to buy, so the marketing should use a mix of prioritized channels.

**Do use** microsegmentation. Two customers with similar backgrounds can have very different channel preferences. Some prospects respond more favorably to mobile ads. Other prospects are better candidates for online marketing or direct mail. Create a multichannel mix that informs via some channels and is response focused in others, based on those customer preferences.

**Don’t forget** direct mail as part of the mix. With so much of marketing moving to digital and mobile channels, direct mail is regaining its status among customers and prospects as a welcome communication channel that stands out.

**Do develop** a long-term strategy that seeks to turn prospects into customers and customers into repeat customers.

4. Optimized marketing mix

Marketing channels must work together, cohesively, in a way that moves customers through the sales funnel from awareness to interest to purchase. In auto sales, for example, a customer who clicks through an online auto ad or is using a car pricing calculator is likely in buying mode. So Web or email outreach needs to be prompt and should focus on getting customers to the key channel, such as a test drive at a local auto dealer.

“Ninety percent of auto buyers start their search on the Internet,” says Dan Smith, VP of product for digital marketing software company Outsell LLC. So, he says, auto dealers need to correlate their multichannel marketing efforts accordingly. Similarly, Smith notes, marketers in other industries should align their marketing mix with their primary source of sales.

To determine how each channel contributes to the performance of a holistic customer multichannel marketing effort:

- Find out which channel a customer prefers and for what purpose. For instance, some customers prefer to research online, but make purchases in a brick-and-mortar store. Others prefer to research in person (showrooming) and then shop online.
- Use a cross-channel management system to provide “a single source of the truth” for all marketing messages that various marketing teams can use. When appropriate, permit the change of different elements (e.g., store location), but not the essential branding and marketing messages.
- Use tools that enable the company to track a customer’s digital footprint. The tools should track items, such as whether the customer received or redeemed any digital coupons or downloaded specific content.
- Use a test-and-learn strategy for ongoing improvements. The multichannel marketing mix may need to be adjusted after its launch if results don’t meet expectations. Test areas such as channel mix, messaging, and email and website design.

Source: Aberdeen Group
What’s the Best Way to Articulate an Idea?

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Traditional Marketing gets CHARGED UP

These marketers in healthcare, higher learning, and real estate still rely on traditional media—but are electrified by the connectivity of digital channels.

By Al Urbanski

In 2010 United States citizens spent an average of 22 minutes a day in nonvoice pursuits, such as texts and apps, on their cell phones. By 2012 this increased nearly fourfold to 82 minutes, according to research firm eMarketer Inc. Much has been made of people’s breathless adoption of new media channels, but rarely is it mentioned that traditional channels are hardly suffering as a consequence. During the same two-year period measured by eMarketer, daily TV viewing increased from 264 to 278 minutes.

Digital marketing explorations are de rigueur in an era when new media forms seem to appear as if by mitosis, but marketers in many mature industries find that they’re best launched from a base in traditional media. “Companies were used to building an audience through mass marketing: TV, direct mail, catalogs. Now each consumer is his or her own form of media,” says Jeff Rohrs, VP of marketing research and education at ExactTarget, a provider of digital marketing solutions recently acquired by Salesforce.com Inc. “Those audiences have an energy and propulsion all their own, and they connect to all of these other followers.”

Still, Rohrs says, many big brands fail to extend the reach of their big, traditional media investments by linking to burgeoning digital media forms. He bemoans the fact that, during the last Super Bowl, the world’s megafest of push marketing, only two advertisers used their multimillion dollar spots to drive traffic to other channels. “Axe bodyspray had a contest to send a person into space and Oreo sent the tweet when the field lights went out that got retweeted thousands of times. Still, I entered the Axe contest and never received any follow-up,” Rohrs says. “Meanwhile, Papa John’s ran local and national ads at lower rates and sponsored the coin flip. Viewers could go online and vote heads or tails to win a free pizza. Papa John’s engaged a huge audience right at the beginning of the game because people had something riding on the flip.”

Rohrs’ point is that traditional mass marketing campaigns are hardly irrelevant in the digital age. On the contrary, they can serve as engagement machines for marketers who link them to digital channels and collect customer data that they cultivate there. “Are you tracking all this stuff? Where does your data live and what’re you doing with it? This is a good starting point for moving into new channels,” says Drew Burns, senior product manager for Adobe’s digital marketing business unit. “Every conversation I’ve had with enterprise customers this year revolved around, ‘How do I take my customer data and put that into a persistent program to use in my marketing?’”

Burns says that marketers need not feel overwhelmed as they tread
into the digital space. He advises marketers to do what they’ve always done best with traditional options: Understand the brand’s value proposition, analyze the data for the best-performing segments, and focus on those segments. Test different calls to action and track what traffic they build. Invest in some tools and provide visualizations for staff that details which segments are reacting better to which types of experiences. Hire a few knowledgeable people.

Print and circumstance
Many college marketers ply a binary strategy of traditional and digital media. High schoolers trawl for college information on social media, their parents peruse and save direct mail pieces, and both do research on websites. The adolescent and adult components of universities’ target market both weigh heavily in the decision-making process, but mom and dad are often paying the bills, so traditional media figures greatly in schools’ media budgets.

“I’m one who thinks print will never die,” says Hallie Sammartino, VP of marketing and communications at St. John’s University. “We do a lot of direct mail: viewbooks, postcards, save-the-dates. We’ve streamlined print, but we’ll never completely get rid of it. Print is still in style with parents.”

The multichannel path is a serpentine one for Sammartino, and often starts on search and social media with students fishing for schools, continues with high-content and high-image direct mail, and follows up with email and website engagement. Sammartino, who arrived a little over a year ago on St. John’s New York campus after working in marketing at Boston College, is installing a new CRM system for undergrad marketing to make appeals more personalized. The goal of both email and direct mail is to increase engagement on the website.

“Eighty percent of college decision making happens on the website,” she says. “If you get them engaged there and can get them to visit the campus, that’s the deal maker or breaker.”

Justin G. Roy, VP of communications and marketing for William Peace University, follows a similar multichannel approach that includes social media, radio, community newspapers, online display ads, and retargeting, bus ads in the school’s home base of Raleigh, NC, and, naturally, direct mail. “Nothing beats the postcards,” Roy says.

A precise choreography must direct such a wide-ranging approach, says Roy, who is attempting to draw more students from Mid-Atlantic states. “If you have a mail piece out or a newspaper ad running, you have to make sure the online messaging is working with the offline. If you’re saying two different things, it’s ineffective,” he says. “If [prospects] touched something you’ve done offline and go online to research, you have to follow with a call-to-action that takes them to the next level of communication.”

Back in the 1980s Datamark, a company that serves the de facto marketing department for several for-profit universities, was primarily a direct mail operation. In the 1990s the company branched out into the Internet and direct response TV (DKTV). As the century turned, pay-per-click campaigns became colleges’ favored recruitment technique, and Datamark SVP of Business Intelligence and Research Rick Bentz expects a big move into mobile in the coming years.

“A significant number of the larger schools switched from DRTV and back into direct mail and search,” Bentz says. “It’s a world in which we’ve had to quickly shift gears.”

In college marketing, print appears to be forever. Upon her arrival at St. John’s, Sammartino commissioned a study that found the school’s brand perception was weak among prospective students, as well as faculty at other universities. The primary vehicle for the rebranding campaign Sammartino kicked off this spring: print ads in The New York Times and The Chronicle of Higher Education.

The HealthNow diet: traditional + digital
HealthNow New York Inc. is about as traditional as they come. The Buffalo-based health insurance company is the licensed BlueCross BlueShield carrier for Western New York. To reach prospective customers for its Medicare Advantage product, it had long relied on a steady diet of TV, radio, and direct mail—and it still does, but now with an added digital kick supplied by Alessandro Renzi, director of digital experience, who the company hired in 2011.

“To say that all people are moving into digital is incorrect. To say that digital [is] the only media they look at is not correct. People still consume a lot of TV and

![Image](http://example.com/healthnow_new_york)
“Radio,” says Renzi, who ran his own digital marketing agency before joining HealthNow. “You get the most from your money when you take traditional and digital and put them together.”

One might not think that Medicare enrollees in their 60s and 70s would be tuned into digital media, but one would be wrong. That’s one of the key learnings HealthNow executives took away from Renzi’s revamp of the marketing program behind the insurer’s Medicare Advantage supplemental coverage. He didn’t change the traditional media mix for the brand, but he made sure that all the TV commercials, direct mail pieces, and radio spots included URLs that led prospects back to the brand’s website.

“Direct mail is still an important medium for this segment. They love paper and they love to read things,” Renzi says. “They love to read things on the Web, too. During the enrollment period for Medicare, the level of traffic that came into our site was tremendous. Using analytics, we found that [visitors] were not leaving after entering the first page, but were going three and four levels deep.”

HealthNow marketers also learned that members of this customer segment were spending time on the website at 3 a.m., since many have trouble sleeping through the night. This is not a daypart choice the company would likely make for its TV or radio schedule, but the digital connection revealed its relevance.

Interview | Adam Sarner, Research VP, Gartner Inc.

Describe the new age of marketing. Marketing had been very push oriented. You ran a campaign, you targeted people. It was like a military operation. It had nothing to do with the people. But now people are dictating how they’re going to be sold to in these real-time channels. Attribution measures will be the norm, and you’ll only get half the story if you’re just measuring offline or just measuring online.

Have the people become the media, as digital pundits claim? The Internet is the biggest communications channel man has ever built. It’s TV, radio, newspapers, the printing press all in one. There’s a lower barrier to entry than anything we’ve ever seen. That doesn’t necessarily mean that when people are building their own channel it has anything to do with business. People don’t want to become some business’s BFF. Marketers should approach social media on a need-want assessment basis. People use it mostly in the evaluation stage of the buying process. It’s, “I don’t trust you, Brand X or Y, but I do trust the people in my channel.”

Where should a company invest first when venturing into uncharted channels? Technology? People? I don’t think any company woke up one day and said, “We want to be social!” Companies did very well being siloed and not talking to customers, but social media changed this. Who in the company should react if somebody posts something bad on a fan page? Marketing? Sales? Customer service? Yes, yes, and yes. However, I think they should explore different roles within their companies. They may need to hire writers, curators, and researchers. This is an area where they may have to do some heavy lifting.

Can agencies fill the gap? The problem is they’re once removed. People inside the company are on it already. They’re on chat, social, email. And they’re going to be the ones to say, “What is the ROI in all we’re doing? How is this affecting the bottom line? Let’s put a business plan in place.”

Is change happening too fast for large enterprises? Small companies can absolutely increase their footprint through social channels. You’ll have big companies buying a blog on WordPress, posting it, and then noticing it’s from 2011. If you’re going to invite this two-way communication flow, you’ve got to serve it. People can smell BS a mile away.

What’s the bottom line for marketers? Get buy-in. If the CEO says we need to have it happen, it’s going to happen. Before you adopt new tools and technology, have a strategy in place. The good news is that people want to buy stuff. Walk them through the decision and help them. That’s the new marketing. Recognize intent and be at the ready with answers.
“We said, ‘Let’s give them the tools and make them our advocates.’”

Rebecca Tann, Regus

Renzi agrees with Adobe’s Burns that creating integrated offline-online strategies needn’t take a lot of time. When he first arrived on the scene, he immediately sought out partners in the communications and IT departments. (“Without their cooperation, you can’t be successful,” he says.) He took three months to set up a foundation for multichannel marketing—looking for tools to analyze customer data and add functionality to the company websites. After some two months of shopping around, he invested in an Adobe CQ5 program and Google Analytics to swiftly build websites and pages and track social media. HealthNow’s beefed-up analytics quickly illustrated that social media is not the sole realm of millennials. The company learned that it had a heavy social media following among women ages 44 to 55.

“An integrated program allowed the Medicare subscriber—or the younger adult shopping for their parent—to really get down into the details of what they should be looking for,” Renzi says.

If you can make it there...

Since entering the U.S. market with the acquisition of 300 office buildings and workplaces in 2004, Europe-based “virtual office” company Regus has been on an upward learning curve, building its knowledge on segments and channels as it’s grown its U.S. locations to 800. Its first major media play was in a traditional channel—broadcast TV. It aired spots on 25 different channels before narrowing its buy to four (Bloomberg TV, CNN, ESPN, and Fox News Network,) that homed in on the business customers who rent its temporary offices and meeting spaces. Next came radio, such as ESPN’s Mike & Mike show, where customer testimonial ads helped to nearly double marketing-led inquiries.

One of the quickest ways to gain multichannel mastery is to hire it, and that’s what Regus did in bringing on current VP of Marketing Rebecca Tann from competitor Oakwood Worldwide in 2008. Tann had a solid grounding in digital methods, having also served as marketing director of FedEx’s Kinko’s unit, now FedEx Office. Her aggressive expansion into multichannel marketing at Regus had its roots in a campaign that accompanied the company’s entry into the New York market in 2009.

“We had a huge flagship location at 747 Third Avenue and seven other new centers, and we were lacking in occupancy,” Tann recalls. “We ended up increasing occupancy 25% in two months with an integrated campaign that targeted key verticals in the Tri-State area, as well as lost and last customers.”

Regus’s New York campaign left no touchpoint, it seemed, unpressed. It included TV, radio, out-of-home, taxi TV, direct mail, and email. The company used alliances with GoDaddy.com and Delta Airlines Inc. to announce its arrival to business travelers, small business owners, and sole proprietors in the market. It staged events at locations and a PR campaign that featured a survey it conducted with New Yorkers about their workplace pain points.

Regus’s multichannel invasion of New York continues to inform its marketing strategies to the present day. “It brought everyone in the organization together to create a multitiered campaign,” Tann says. “We took away some great learnings.”

One of them was that there are ways to control traditional brand messaging in the wild and woolly world of social media. Over the past year Tann and her staff have gotten serious about improving the company’s activities there. Worried about not being able to control the brand message, Regus had established a policy that no employees could tweet about the company. Tann and the marketing team saw that policy as unrealistic and embarked on a program to open up the tweet-gates and turn employees into Regus’s positive social media force. They hired social media managers who trained 500 handpicked employees, including salespeople, members of the operations team, executives, and receptionists at Regus office center locations.

“We said, ‘Let’s give them the tools and make them our advocates,’” Tann says. “The mind-set on the executive team changed to, ‘OK, let’s do this right or else we’re going to miss out on a great opportunity.’”

Tann’s advice to marketers looking to expand their horizons into digital harks back to traditional business wisdom: Don’t be afraid to take a risk. “Of course it’s a challenge and a risk. You have to be cognizant of that,” she says, “Provide your people with the tools and the training they need, but allow them to bring their personal flair to the party. Employees have to own and believe in what they’re doing.”

She also echoes a common warning of experienced digital marketers: “The winning formula is that there is no winning formula. It’s an ever-changing landscape requiring constant monitoring and tweaking.”

“In the past five years we’ve had three different websites. We’re still learning what we need to do to increase conversions. Our marketing automation is still in the hands of marketing and hasn’t been integrated into the sales effort as yet. Enterprise companies are starting to use us, but we haven’t targeted them properly,” Tann observes. “It’s an ongoing science project.”
Channeling the Customer

Multichannel data can help crack the code on identifying target audiences and their preferences.

By Elyse Dupré and Ryan Joe

Capturing and integrating data from across channels is a daunting challenge, but provides a matchless opportunity to understand customers and gain a competitive advantage. "As the online world matures, the heavy distinctions that we’ve had between channels will dissipate, and it’ll just be marketing," says Eric Stein, EVP of online solutions at multichannel marketing solutions provider Epsilon. "We’ll have marketing to consumers that spans online channels and offline channels. And that’s the best way to market to consumers."

In the end, all marketers want the same things: the ability to target, reach, and measure marketing programs, Stein says. Data helps marketers obtain these objectives by identifying target audiences and clueing marketers in on what their customers really want (and how they want it). Here’s how three companies have used multichannel data to benefit themselves and their customers.

Johnny Cupcakes links data, discovers new opportunities

Customers may not always be who brands think they are and analyzing data assets from different channels can provide an eye-opening view. Johnny Earle, CEO of graphic apparel retailer Johnny Cupcakes, thought he knew his customers to a T: collectors and “die-hard” followers. At the time, his company didn’t glean much information about its customers from its social presences, but after installing a solution that analyzes social behavioral data from TrueLens, Earle discovered that the majority of his customers were first-time buyers.

Earle says this misperception had led him to underestimate Johnny Cupcakes’ reach and sales potential. “We’ve kept our shirts out of [third-party retailers] because we wanted to largely appeal to people who collect our shirts,” Earle says. “We almost put a cap on how much we could grow because we thought, ‘This is it. These are our customers, and I don’t know what else to do.’”

To better identify and target Johnny Cupcakes customers, the brand began to examine its cross-channel data using TrueLens. By combining historical customer data, such as previous email click-throughs and transactional information, and adding a layer of insight from social data, Johnny Cupcakes not only identified its die-hard collectors, it also identified the connected, casual customers who don’t purchase frequently but spread the word on social outlets when they do. It also uncovered special interest customers partial to specific themes or characters, such as sports or Hello Kitty, reflected on Johnny Cupcakes apparel.

The retailer now tracks what customers and prospects talk about on social networks to spot trends and changes in customer interests. Johnny Cupcakes identifies these prospects as people who have subscribed to Johnny Cupcakes product email lists but haven’t made a purchase. TrueLens also uses “look-alike” modeling by comparing socially active consumers...
Customer

audiences and their preferences.

from its database to Johnny Cupcakes’ best customers, and then forecasting which customer segments would be most responsive to certain email messages.

As a result, Johnny Cupcakes can more efficiently target specific customer segments and anticipate future customer activity. For example, the brand launched a “Midnight Snack” email campaign for the launch of its new T-shirt line. Targeting its key segments with tailored email messages resulted in a 141% increase in sales and a 42% lift in click-through rates. Lucas Dunn, business director at Johnny Cupcakes, says this insight has led the retailer to be more selective when choosing which products to highlight for each segment and what subjects to include on its apparel. In addition, Dunn says that Johnny Cupcakes is also looking to segment its email campaigns based on gender data; it would use the same email copy, but feature an image of a guy wearing a T-shirt for male customers and a girl wearing a tank top for female customers.

“[Data] affects our strategy and our planning on a product level,” says Lucas Dunn, Johnny Cupcakes.

Half Price Books combines data to drive engagement

If you’re a midsize bookseller, you know immediately who your competitor is: Amazon. To find oneself across the battlefield from the online e-commerce giant is not an enviable position. But while Amazon might seem like a master in all things digital, a company like Half Price Books has something Amazon could never replicate: a loyal, almost cultish following. Kathy Doyle Thomas, EVP of Half Price Books, knows how important this personable relationship is—and it’s why she set out to implement a cross-channel marketing strategy.

Doyle Thomas compares Half Price Books to New York’s famed Strand Book Store—though Half Price is more expansive: The family-owned chain has 117 stores in 16 states. Half its merchandise is used books; the other half is overstocks from publishers. In December 2011 the book retailer began using a tool from ExactTarget, a provider of digital marketing solutions recently acquired by Salesforce.com Inc., to host both of its customer lists. It sounds simple—merging two data sources—but finding a partner who could actually do this turned into a process. “There weren’t many [vendors] that could handle the postal mail and the email list,” Doyle Thomas recalls. “We’re considered a midsize company, with more than 700,000 in our email list and 350,000 in our postal list.” That might not sound huge, but it was large enough to be difficult to manage.

Half Price Books needed to merge these disparate datasets because it wanted to better control its marketing. For one, the book retailer got a big return from direct mail. “It was important for us to get all that [email and postal] data in one place and see how much overlay we have,” Doyle Thomas says.

Merging data from both postal and email also allows Half Price to build better, more precise marketing campaigns. For instance, it can now geo-target its email messages. “We don’t want to bother people with an email about something that’s happening in Texas when they’re in Alabama,” Doyle Thomas says. “You get a better return, and you don’t tick off your customers. And we can do it all in one swoop.”

Perhaps Half Price’s biggest success is incorporating its social channels to drive email engagement and, ultimately, store traffic. A recent Facebook campaign offered a 20% discount coupon (after A/B testing, Doyle Thomas realized this would be more successful than the alternative: $5 off a $25 purchase). Connecting Facebook with email and tracking the coupon to in-store purchases allowed Half Price to know exactly how successful the campaign was: It netted 36,000 new email subscribers and 14,000 new customers coming through the brick-and-mortar outlets. Additionally, monitoring social conversation gives Half Price an idea on how to communicate in other channels. “You can target the email campaigns based on the chatter that’s happening with our Facebook fans,” Doyle Thomas says. “That gives you new information about the psyche of why people are shopping from you—not just how old they are, but their likes and dislikes.”

Because Half Price differentiates in part with its rich customer connections, cross-channel integration is less a luxury and more of a necessity. The book-selling industry is at once languishing and highly competitive, especially given Amazon’s mountainous presence. “You really need to be as much on your game as you can,” she adds.

(Continued on page 16)
Bravo crosses channels with customers

About two years ago, commencing with the ninth season of its hit reality TV cooking contest *Top Chef*, the NBCUniversal-owned cable network Bravo Media LLC initiated what its Digital Media EVP Lisa Hsia describes as its “first foray into transmedia storytelling.” The “experiment,” in Hsia’s words, resulted in the supplementary Web series *Last Chance Kitchen*, through which banished *Top Chef* contestants could compete for a chance to return to the main television show. During the Web series’ second season, chef Kristen Kish won *Last Chance Kitchen*, returned to *Top Chef*, and won the final contest. For viewers, what was once a supplementary Web series became an integral subplot within the *Top Chef* narrative.

“Bravo has a long history of multiplatform engagement,” says David Kaplan, VP of Bravo ad sales research at NBCUniversal. He points out that Bravo viewers are 32% more likely than the general population to own tablets and 18% more likely to own smartphones. Bravo pays close attention to the way its audience watches its shows on these different formats. Hsia points out that in season nine, for instance, there were eight million video views of *Last Chance Kitchen* across its Web, mobile, and video-on-demand channels. The recently ended season 10 saw an overall increase of 14% in viewership, much of it driven by a 56% mobile increase. “Some of the content is tailored to a particular screen,” Hsia says, pointing out that Bravo’s mobile content is usually shorter. She adds that the second screen works to enhance interactivity—pushing out polls, synced content, and interactive commercials. “It’s important that we have a strong multiscreen presence from the brand perspective and to increase our reach and discoverability,” she says.

But with that multiscreen presence—and as once-optional Web content becomes increasingly important to on-air shows—Bravo needs metrics to better understand how its consumers move from channel to channel—and why. This is, Hsia admits, a bit of a sticking point from a behavioral measurement perspective. “We still face challenges tracking fans across platforms,” she says. “I’d like to know if fans click on a Facebook link, which takes them to a piece of content on our website—where do they go after that? How can I more effectively get them to consume more content? And what are the most important drivers to get fans to cross platforms in our transmedia storytelling experiences?”

Another area she’d like more insight into is tracking across some of the newer video channels. The cable channel can easily track Web audience, TV audiences, and audiences who watch on both TV and Web; but tracking those audiences who view content on the mobile Web or on tablet apps is still difficult. “Currently, robust single-source behavioral measurement across touchpoints is not readily available,” Hsia says. “And so, marketers are challenged to accurately understand their multiscreen footprint.”

However, Bravo continues to experiment and test. Despite some limitations in measuring across channels, Hsia knows Bravo’s audience is highly engaged across multiple channels, which is why the network continues to study and harness that passion. This is exemplified best in Bravo’s “social editions”—reruns overlaid with social posts that were made during the episode’s premiere. Bravo research found that these social-infused reruns add a 41% lift in social activity the week after a social edition airs, and a 34% lift the week after. “So, we’ve found fan recognition like this actually deepens fan engagement and increases multi-channel participation,” Hsia says.

Customer focused

With so many channels to choose from, it’s easy for marketers to design campaigns around the channels, rather than around their top priority: the customer, says Ashley Johnston, SVP of global marketing at Experian Marketing Services.

She says that traditional brick-and-mortar companies are now “retrofitting” and are prone to designing for a channel compared to their online counterparts. And while data shines light on high-value customers, it’s important to not let other high-potential customers’ desires and preferences fall into the shadows. So let data be a study guide, just not a final answer.

3 Data Do’s and Don’ts

Bravo Media LLC and Citrix Systems Inc. share three major data do’s and don’ts:

- **Do conduct research to identify your target audience**
  For Bravo, keeping in mind the “one connected fan”—one who can access and experience content across channels—is a key strategy, says Lisa Hsia, EVP of Bravo digital media at NBCUniversal. Bravo applied syndicated data from comScore Inc., The Nielsen Company, and primary research to better understand and quantify its viewers’ channel migration patterns, as well as determine what content and advertisements will resonate with them.

- **Do encourage consumers to interact with your brand**
  After learning from Nielsen that one third of active Twitter users tweet about TV content, Bravo began broadcasting “social editions” of its shows, which consist of viewer Twitter and Facebook posts appearing on program reruns. Hsia says these social-edition reruns boost ratings and increase social activity around Bravo for fans whose posts were broadcast. “There is no better advocate for our brand than a *Real Housewives* fan with a mobile phone,” Hsia says.

- **Don’t think too broadly**
  Citrix’s Vinny Sosa, director of Web intelligence and optimization, advises marketers to prioritize their data. “Think about the little data that you need inside of that Big Data bucket,” he says. “For us, the first step is really identifying those things that you’re able to take action on and target.”
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MARKETERS SOUND OFF: TRENDS TO WATCH

Multiple Channels, One Customer Relationship

The real power of a cohesive omnichannel marketing strategy is its ability to bolster engagement and build customer loyalty

By Ginger Conlon

Just tacking on a channel doesn’t make marketing “multichannel.” In fact, a disconnected multichannel marketing strategy can do more to hamper customer engagement and loyalty than to build and maintain it. Worse, poor cross-channel marketing can send frustrated customers into competitors’ waiting arms.

Customers today increasingly expect consistency across channels. Marketers need to take a more cohesive omnichannel approach to meet those expectations. With that in mind Direct Marketing News asked several industry insiders the following: What is one trend in multichannel marketing today that marketers should harness?

Dan Darnell
VP of Marketing and Product, Baynote

Personalization is a powerful tool that few truly understand. Personalization is about delivering relevant experiences based on what you know about a visitor—no more, no less. You can focus so much on creating a unique experience that you forget what you’re really trying to achieve, which is better results. Uniqueness is a possible by-product of personalization, but certainly not a requirement. Instead of thinking about uniqueness, focus on relevance. What if Fred Smith comes to your e-commerce website and is presented with the perfect product to meet his needs, but a thousand other people are shown the same product and have an identical experience of the perfect fit? Is this no longer personalized? Of course it is. When you focus on delivering the most relevant content that you can, you get to the real objective, which is maximizing engagement, revenue, and, hopefully, lifetime value.

Michele Fitzpatrick
Executive Vice President, Strategy and Marketing, The Agency Inside Harte-Hanks

Journey mapping and customer experience design are must-haves for all brands and essential skills for any loyalty marketer. In today’s omnichannel and connected consumer landscape, building and maintaining customer loyalty is tougher than ever. Marketers need to actively and relevantly engage with consumers throughout their path to purchase, to gain their loyalty and drive repurchase. Static one-size-fits-all campaigns and messaging strategies no longer work. And channel silos need to be broken down and reconnected in meaningful ways around the consumer in real time. The good news is that a better customer experience can be worth millions in annual revenue. This has been proven out in the financials. The way to get to a better experience is through customer journey mapping, a relatively new marketing discipline that combines the practice of traditional touchpoint mapping with customer experience design and customer strategy.

Kyle Christensen
VP of Product Marketing, Responsys

As programs go increasingly cross channel, marketers need to rebuild the foundation of consumer trust. In the past few years major brands with great reputations have been hit with lawsuits seeking tens of millions of dollars for marketing to customers without permission. These costly mistakes happen because preferences and permissions have become fragmented and unmanageable within organizations, with data living in silos across various departments, geographies, and lines of business. Marketers haven’t had the right technology to unify and proactively manage customers’ preferences and permissions across every point of interaction, from an email to a mobile app to the point of sale. They need to find a solution that not only ensures compliance with an ever broadening regulatory framework, but gives customers a voice, enabling them to choose how, when, and where marketers communicate with them.

Joe Cordo
CMO, Extraprise

The big multichannel marketing trend is to evolve from a transactional view of the customer to a behavioral view to improve the customer experience, as well as build and maintain customer loyalty. Marketers engender customer loyalty when they optimize the customer experience in two ways: being in tune with the customer’s need, and providing a level of personalization that engages the customer at the right time and place. However, not all marketers have the data, behaviors, and
technology to execute on those two directives. A first step in the right direction is for marketers to treat customers as customers and not contacts. Many marketers repeatedly leverage simplistic data about the customer in their marketing automation or campaign platform. But a marketing database with rich customer profiles begins to encapsulate customers’ needs, behaviors, and ways they want to interact. Extending the marketing database to include unstructured data, and fully supporting all relevant channels to that customer, is necessary to optimize the customer experience—addressing customers’ needs and making it personal.

Kerry Reilly
VP of Marketing, ClickSquared
The one trend is two words: better data. These days many of us are occupied with the idea of Big Data. It can be scary; you need talent and you’re tasked with managing a huge database and purchasing specialized tools to take advantage of it all. While the tools are available to collect every keystroke, most of that information is anonymous or not particularly useful in helping marketers to be more effective. We say, “Don’t boil the ocean.” Think about the data you need to drive your marketing programs and make yourself relevant and timely. Focus your efforts there. We like where we see multichannel marketers headed. They’re focusing on two things: the use of embedded, prescriptive models and of descriptive models such as recency, frequency, and monetary value to turn their data into better, actionable information that serves up relevant content. That’s the secret to building and maintaining customer loyalty.

Jacob Aizikowitz
President, XMPie
As new modes of multichannel marketing and communications evolve, companies that provide a positive, holistic customer experience across all touchpoints—where print is included in the mix—are well positioned to succeed. This is the biggest trend we see in the industry and what research has verified.

Today multichannel communications often means relevant, personalized, online communications within the digital realm: Web, email, and mobile. But lately, marketers are finding that a strategy that relies solely on interactive digital communications can sometimes fall short of objectives. Online, interactive communications are powerful and immediate, but at the same time virtual and intangible.

Creatively compelling, individualized print that digital printing and print personalization software can deliver adds staying power to communications, enhances the customer experience, and builds a perfect complement to any multichannel marketing campaign. The magic in one-to-one print (i.e., direct mail) communications happens when print becomes a first-class citizen in the multichannel mix—giving marketers a unique and powerful competitive edge.

Jeremy Bloom
Cofounder, Integrate
Closed-loop reporting is an underutilized tactic for effectively optimizing multichannel marketing strategies. By implementing a system that automates direct communication between marketing and sales teams in real time, advertisers can continually reallocate budget to the highest performing publishers, channels, assets, or target audiences—maximizing efficiency and return on ad spend.

These types of systems leverage data gathered from the sales team’s CRM and marketing automation (MA) platforms to assess campaign performance, providing a continual stream of information that dictates necessary marketing alterations. When media-buying technology is properly integrated with CRM and MA platforms, this system becomes highly efficient and effective. Marketing teams can quickly optimize lead generation, branding, or nurturing campaigns by channel, method, or any other tactic, continually improving the entire cross-channel strategy and maximizing ROI.

Despite the effectiveness of closed-loop reporting suites, marketers have been wary due to initial setup complexity. Still, the benefits far outweigh any potential headaches.

Mike Caprio,
VP, Video, Broadcast, and Connected Devices, DG VideoFusion
TV is still the 800-pound gorilla for engaging consumers with video, but it’s flat. The primary screen in the house still serves as the ultimate reach and brand vehicle, but it’s still only a one-way conversation. Sadly, as online video continues its meteoric rise, 90% of the streams consumers watch contain a repurposed linear TV commercial. The capabilities for interactive online video can’t be any easier to implement than they are today. Self-service creative tools make it painless to add social interactivity to video, pushing brand engagement beyond the 15- or 30-second pre-roll. Interactive video, plus television reach and social integration, allows brands to leverage existing assets cross channel while driving a two-way discussion with consumers. Given the great benefits available in a digital environment, no marketer looking to inform their loyalty marketing program through video should be running non-interactive online video.

Patti Renner
Director of Marketing, Knotice
The main trend is leveraging internal data for tailored multichannel messaging. Customers don’t think in channels. In fact, what they want is consistency across touchpoints and interactions. They’re also looking for brands to provide them with utility—information or services to help make their lives easier or more entertaining. A customer-centric approach to marketing
means that marketers need to resist the temptation to simply push brand. Instead, the focus needs to be squarely placed on the customer, with messaging tailored to each individual’s interests. This extends beyond content targeting all the way to the device they use when receiving that preferred content. Accomplishing such cross-channel excellence requires marketers to use their data. This is easier when you have comprehensive activity data for each individual, where cross-channel information is gathered and stored in a unified data management platform. It’s time to use your data to “show them that you know them.”

James Norwood
CMO, KANA Software Inc.

Selective selling in the customer support center is the trend marketers should watch. Context is king for successful omnichannel strategies and for empowering customer service reps to consistently create customer experiences that count. Surfacing contextual information when and where service reps and customers need it most is one surefire way to convert Big Data into actionable knowledge that boosts the bottom line. Context incorporates the past, including recent interactions and purchase history, with current persona, contact channel, billing cycle, and open case details. It also engages the future, and here is where we see organizations beginning to insert relevant marketing offers and best next actions that can aid customers or service reps to move seamlessly from support to sales processes. Only by linking departmental information silos can organizations deliver the experiences customers demand in the 24/7 global marketplace; and evolve to these new marketing opportunities. Such a transformation requires C-suite leadership and an “everybody serves” mind-set.

Paul Brown
HP Exstream Product Manager, Hewlett-Packard

Analytics offers a growth opportunity for today’s multichannel marketers to reach consumers with the information they want most. However, companies should focus less on acquiring additional analytics solutions and more on analyzing the data they already have to create one message across all communication channels.

With tools available like social media monitoring, multivariate testing, and geolocation services, you might think creating and delivering targeted communications comes easy. Yet, it doesn’t. Why? Most of these solutions address only one channel (e.g., SMS, social media, email); this inevitably leads to inconsistency across customer communications and “dashboard overload.” CMOs who analyze disparate data within their existing systems to create a consistent brand message across all channels will find increased customer satisfaction, loyalty, and retention.

“[Customers] want consistency across touchpoints.”
Patti Renner
Knotice

Harriett Hayden
Head of Business Operations, North America, DC Storm Ltd.

Many marketers focus on their marketing strategy and how they’re going to implement it without putting as much thought into how they will measure its success. Just because a user has taken advantage of a reward or discount doesn’t mean that the loyalty scheme deserves all of the credit for the sale.

To understand if it’s worth paying the extra commission for loyalty marketing, marketers need to measure the difference it actually makes to the bottom line. This can be achieved through extensive A/B testing and by comparing the difference between paths to conversion, where users have taken advantage of loyalty marketing channels and where they haven’t.

The success of a channel cannot be viewed in isolation. A multichannel attribution model based on analysis of actual user behavior is essential to uncover the true performance of each channel in the context of all marketing activity, to help to answer the age-old question, “Is it worth it?”

Scott Ferber
Chairman and CEO, Videology

Cross-screen addressability—while it can be challenging to achieve, it’s worth the effort. We consistently see that when relevancy and targeting improve, so does ROI. The heart of true cross-screen addressability means using data to connect the dots across all devices.

Generally, we limit this discussion to digital screens: online, mobile, and connected TVs. But if we don’t connect to traditional television, we’re missing a crucial part of the equation. We’re seeing progress toward greater alignment between TV and digital video right now in the coming upfronts. We can only guess that as brands’ success mounts in executing true cross-platform campaigns, investment and interest in further developing addressable, cross-screen planning and buying tools will grow. Whether this entails set-box data or user-supplied registration data, advancements in developing a more accountable link between television and online audiences will be a great advancement for marketers.

Fast facts

73% Marketers who deem measuring ROI as “very important.”

29% Marketers who admit that they don’t currently measure ROI.

Source: Black Ink
Here Comes Big Content

Marketers need an agile content supply chain to keep fresh content coming.

The social Web has made content the new currency of trade. Big Data may be the intelligence behind microtargeting, but the precision of your aim doesn’t matter if the customer experience falls short. Content, once again, is king. And brands that fail to develop a content strategy will find themselves in a very lonely place as social engagement fails to happen.

So, it’s perhaps no surprise that Gartner’s 2013 social marketing survey pointed to content as the bottleneck for social marketing: it’s seen as primary skills gap, the most outsourced function and, it would seem, the area of most consternation when it comes to activating social engagement.

Old idea, new meaning

The excitement about content is by no means new. We’ve talked about content for ages. But content in the age of social and multichannel is far different from content of yore. Here’s how:

It’s human. It speaks with a conversational voice, from one human being to another. Gone is the self-congratulatory chest-thumping and stilted corporate speak.

It’s neutral. The best content is brand neutral. It favors audience-centric issues and points of view over self-congratulatory claims and, frankly, boring value propositions.

It’s simple. Einstein said that everything should be as simple as possible, but no simpler. Great content gets to the point, fast.

It’s visual. Content relieves audiences of the burden (and eye strain) of dense text, telling stories in ways that are highly visual, artful, inspiring, and emotionally evocative.

It’s borrowed. Leverage happens when you curate third-party content, where you add your own perspectives in the form of annotations that advance your storylines.

It’s conversational. Communities talk back to sustain dialogues. The best content marketers welcome contribution that defends or argues against their point of view.

Of course, all of this is easier said than done. Content marketing is hard work and it can run headlong into incompatible cultures, process, and governance models. So, you need a plan of attack.

The content supply chain

What’s required is a process that supports a sustainable, replenishing content supply chain, which is governed by a set of policies that balance the seemingly conflicting objectives of speed and control. Too much speed means chaos. Too much control? Stasis. Production grinds to a halt. But when you blend the two, you get something powerful: agility.

Large manufacturers have taught us about driving quality and efficiency at scale. Smaller technology companies have shown us how to learn fast and turn on a dime. As a content marketer, you need both skills. It starts with a content supply chain. Here’s what that means:

- **Sourcing** is about combing three content streams: creation, which is the original rendering of text, videos, infographics, etc.; curation, where you discover, organize, and annotate third-party content; and cultivation, which happens when you mobilize a community to create and contribute content on your behalf.

- **Manufacturing** is the creative work required to produce high-quality storytelling via these three streams. To scale, like traditional manufacturers that blend in-house and outsourced capacity, you should tap internal resources together with agencies and freelance networks that aggregate creative talent. Despite of how you choose to scale, be sure to assign an in-house leader—an editor-in-chief, or chief content officer—to direct and inspire your efforts and to capture and internalize learning.

- **Distribution** follows a three-tier cadence of ambient, responsive, and calendar-driven production. Ambient is the day-to-day pulse—of content that helps you sustain and grow engagement by distributing content assets and elements both great and small. Responsive is the result of social listening, where brands use breaking moments to inject themselves into a shared experience, engaging in an approximation of real time. This is an advanced skill that most content marketers struggle to pull off. Finally, calendar-driven distribution involves longer-fused investments, often organized around themes, not unlike the editorial calendars that drive magazines and other journalistic forms.

The glue that holds all this together also comprises the artifacts of manufacturing: demand planning is a combination of social listening and communications strategy; master production schedules drive sequencing of content production and publishing; blueprints are the models that define how content elements fit together to support a variety of content assets, across a variety of channels; and bills of materials are the inventory of all of your contents, variants, and derivatives.

Of course, what I’ve described is the basis for a large-scale content supply chain. But whether you’re just dipping a toe in the water or ready to scale, begin your content marketing journey with the end in mind.
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Crissy Davis, Director of CRM and Loyalty for Frontier Airlines

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