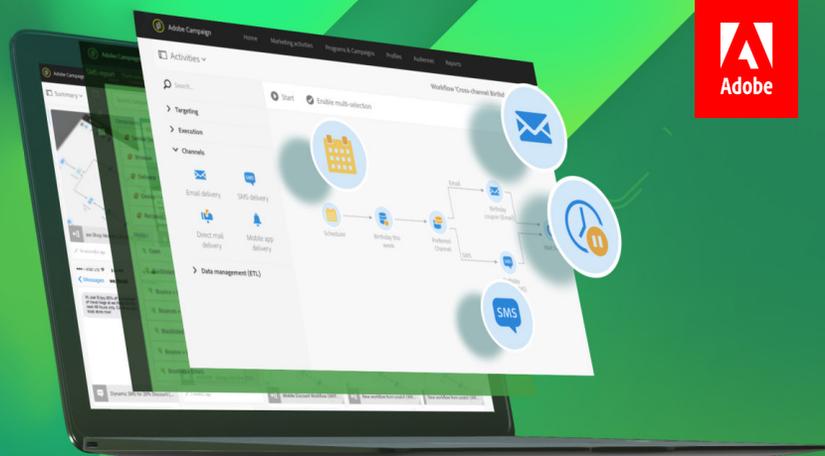# How to select the right campaign management solution.

Every organization is at a different point in their progression with campaign management. Maybe you've had some success with email marketing and you want to expand your efforts across additional channels. Perhaps you invested in a campaign management solution several years ago when you had fewer marketing channels, simpler data sets, and less sophisticated customers. It could be you're a new marketing team, eager to set yourself up for success with an enterprise-class campaign management solution that meets all the requirements you know about—and even some you don't.

Wherever you are in your campaign management endeavors, investing in a new solution is an important decision that will have significant short-term and long-term impacts on your marketing efforts. Reaching the best decision for your organization will take considerable time and effort that will likely involve you engaging in substantial research and evaluation. To help you in that effort, this guide covers some of the most important questions you should ask and issues you should investigate. It provides tips for navigating the information and the targeted marketing you encounter along the way to help you make informed, objective assessments of the solutions you evaluate.

Current and future needs.

One of the biggest mistakes organizations make when they start investigating campaign management solutions is focusing on whatever organizational marketing issue or capability happens to be trending at the time. This approach often leads to investing in point solutions. There can be compelling reasons that make point solutions seem appealing. It could be the ability to solve a specific issue really well. It might be price. Sometimes it's ease of implementation. These can be tempting motivations, but point solutions are not usually a good approach because they typically

only solve short-term needs without looking toward the future. As your marketing needs change and expand, you end up having to look for new solutions. All too often, the result is disconnected tools that lead not only to inefficiencies for you, but fragmented brand experiences and frustration for your customers.

A better approach is to investigate more comprehensive, holistic campaign management solutions that can address your current needs and grow and evolve as your needs do. If you haven't already, it's a good practice to think about what those future needs might be. That could start with considering the anticipated growth for your industry or customer base. What's your current product road map? What are your marketing maturity growth plans? What do you need to do better or differently to compete with market leaders? What marketing innovations do you need to initiate or embrace to become or remain the market leader? How will emerging technologies or predicted shifts in customer behavior impact your ecosystem and how you need to market?
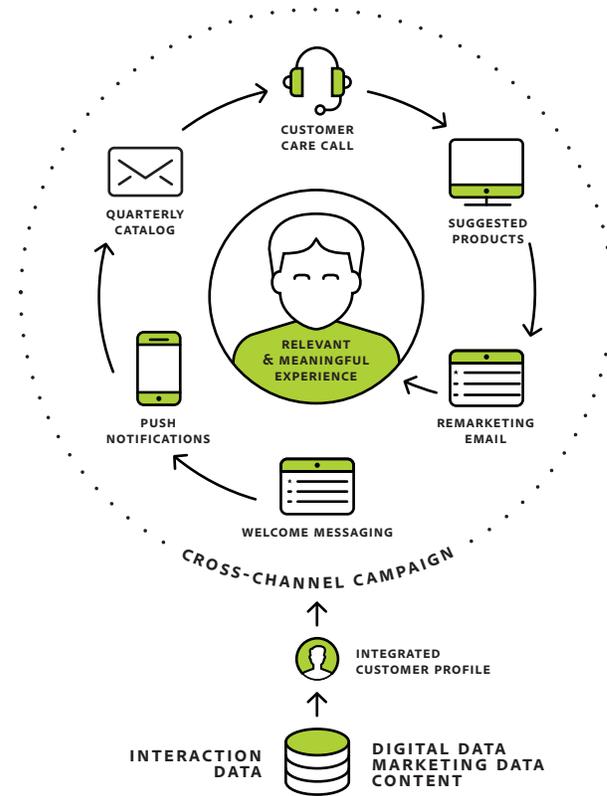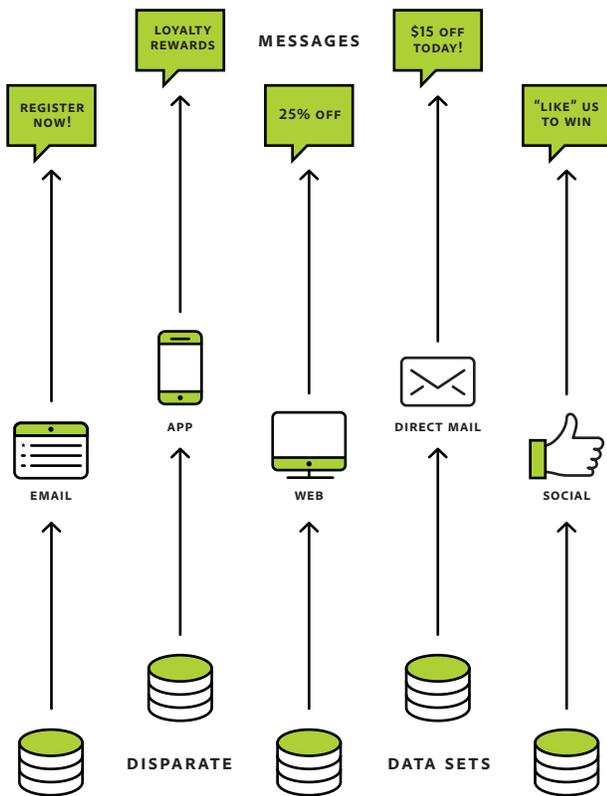
As you consider your future needs, you want to choose a holistic campaign management solution that allows you to manage campaigns across all the channels you engage today and the ones you might engage in the future. Several vendors play in either the

A siloed and broken experience. VS **Orchestrated customer journey.** ACROSS CHANNELS

email service provider (ESP) or campaign management space, but very few can do both. Beyond that, some vendors tout themselves as holistic, but only help you with online channels, ignoring offline channels such as direct mail or call center contacts. A holistic solution should enable campaign orchestration across all those channels.

POTENTIAL GOTCHA:

Some vendors tout themselves as holistic but only address online channels, while ignoring offline channels.

Some things to consider in helping you determine the comprehensive nature of a potential solution are how well it will help you understand customer preferences, past purchasing behaviors, demographics, geographic locations, and other customer characteristics? Will the customer information it provides be sufficient to create contextually precise and relevant messages for individual customers? Will it allow you to create a level of

hyper-personalization that makes your brand messaging clearly resonate with individual customers based on their preferences?

If you choose a holistic campaign management solution, when your marketing activities expand you'll be able to create unified customer experiences across all channels and segments. You'll save on the costs of buying multiple point solutions, as well as the time and effort trying to somehow make them work together. A holistic solution eliminates the pains that come from fragmented marketing efforts, disconnected customer experiences, and missed opportunities. With a comprehensive, holistic campaign management solution, you can meet customer expectations with relevant, coordinated, and consistent experiences across all the channels they engage in. You can consolidate what would otherwise be different point solutions into your technology stack and bring in multiple activities and marketing functions into a common marketing platform.

Flexibility options.

The rigidity of some campaign marketing solutions simply limits their ability to meet your current or future needs.

For example, the pricing models of some campaign management solutions can be difficult to work with. Look for a solution with flexible pricing that doesn't punish you every time you send an email. That's what you typically get with solutions that charge based on cost per thousand (CPM) impressions. You can get more value with a solution that only charges you based on active contacts and channels that you use. That way, you can grow your database and expand your marketing sophistication over time and pay for this additional value as you realize it.

Questions to ask:

Can a solution natively integrate all your potential channels? If not, how much time, effort, and budget will integration require?

Questions to ask:

What channels do you use today and what channels might you engage in the future?

- *Email*
- *Social media*
- *SMS*
- *Mobile Apps*
- *Web*
- *Pay-per-click*

- *Call centers*
- *Direct mail*
- *In-store*
- *TV*
- *Emerging channels in your space*

Maturity framework.

You also need a solution that can help you no matter where you are in your current marketing maturity, as well as enable you to continually rise to new heights. Every organization is at a different point in their marketing maturity. Campaign management solutions have different levels of marketing maturity too. Some solutions simply don't match up with your current maturity, making them either too difficult to use or too simplistic to gain value from them. Others might be ideal for your current marketing maturity, but they lack the means to help you progress in your marketing efforts. Look for a solution that can help you where you are today in terms of marketing maturity—and help you achieve new levels of sophistication as your needs and customer requirements dictate.

For example, you might be focused at the level of email and mobile marketing. If so, you need to assess your maturity level today—and identify what you need to improve. Are you good at getting offers to target segments on a recurring schedule, but still need to work on personalization? Are you at the point where you are able to make real-time offers?

If you're working in the campaign orchestration arena, where are you in terms of personalizing, automating, and delivering cross-channel campaigns? Do you have a solution that lets you personalize messages at scale? What's your lead time between campaign concept and execution? And how are you doing with synchronizing offers across multiple customer touch points?

If customer journey management is the order of the day, does your current solution help you manage the transition from interested prospect to loyal customer? Does it focus on customer acquisition, but fail to deliver capabilities and best practices to drive retention and growth? Can it help you deliver compelling journeys not only across online and offline channels, but from anonymous contact to authenticated experience?

But even more important than the ability to evolve maturity within your current stage, you need a solution that will help you evolve from one stage to the next. If you're starting with email and mobile marketing, your eye should be on maturing to cross-channel campaign orchestration. If you're starting
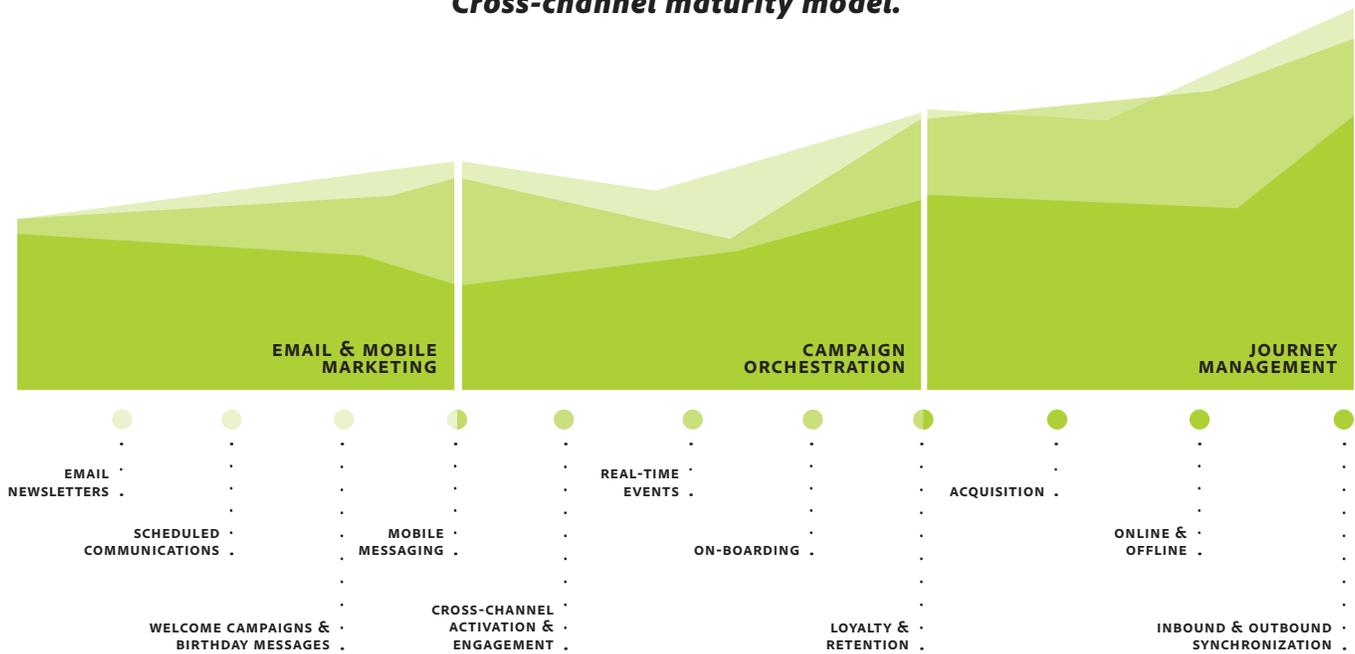
Questions to ask:

Does the vendor have a defined path toward increasing levels of marketing maturity? What tools, capabilities, and support will the solution and vendor provide to help you progress?

Questions to ask:

Do the vendor's capabilities focus primarily on customer acquisition? What specific capabilities do they offer to support customer journey management post-sale?

Cross-channel maturity model.

EMAIL & MOBILE MARKETING

CAMPAIGN ORCHESTRATION

JOURNEY MANAGEMENT

EMAIL NEWSLETTERS

SCHEDULED COMMUNICATIONS

MOBILE MESSAGING

WELCOME CAMPAIGNS & BIRTHDAY MESSAGES

CROSS-CHANNEL ACTIVATION & ENGAGEMENT

REAL-TIME EVENTS

ON-BOARDING

LOYALTY & RETENTION

ACQUISITION

ONLINE & OFFLINE

INBOUND & OUTBOUND SYNCHRONIZATION

with orchestration, you'll quickly want to evolve to full journey management. This kind of deliberate progression—from email and mobile marketing to cross-channel campaign orchestration to full customer journey management—is the very best and fastest way to get value from a campaign management solution.

A marketer's end game is to fully understand the customer journey and to be able to manage not only one individual journey, but an entire customer life cycle to build long-term loyalty. Look for a vendor that offers the same to you—one that recognizes your unique path to digital transformation and is willing to design a customized approach based on your unique needs, vision, and teams.

This should include the ability to assess your current content programs, data usage, and delivery systems and set goals for incremental improvement. You should have access to account managers, services offerings, and field-tested methodologies for evolving your sophistication and results over time. And you should expect a vendor that can guide you toward both quick wins and long-term, sustainable growth.

Marketing integrations & extensibility.

Just as your marketing campaign solution needs to be holistic, it should also seamlessly fit into your entire marketing framework

and workflows. Does it have the native and third-party integrations you need to manage the full customer journey, from creating and activating personalized content to measuring and optimizing the results of your campaigns? A marketing campaign solution that can't connect will disrupt, cripple, and slow down your overall marketing efforts.

For example, can the solution tie into your content creation workflows and content management systems? Does it have needed integrations to facilitate your ability to quickly deliver consistent, contextually relevant content and messaging to all your different channels? You don't want the negative impact that comes when a customer clicks on a recently sent email only to discover that the offer it contains has already expired. Or the fallout that results from using non-approved brand imagery in a high-visibility campaign. Most importantly, you need to make sure you don't send conflicting messages to the same customer through different channels. Avoiding all these pitfalls requires integrations that give you control and consistency across all your workflows and channels.

You also want to maximize your campaign staff time and resources. So look for native integrations between your HTML coding tools and campaign management solution. This includes capabilities like bidirectional synchronization of updates between the two systems, the ability to upload local images once and have them populate both systems, and streamlined features
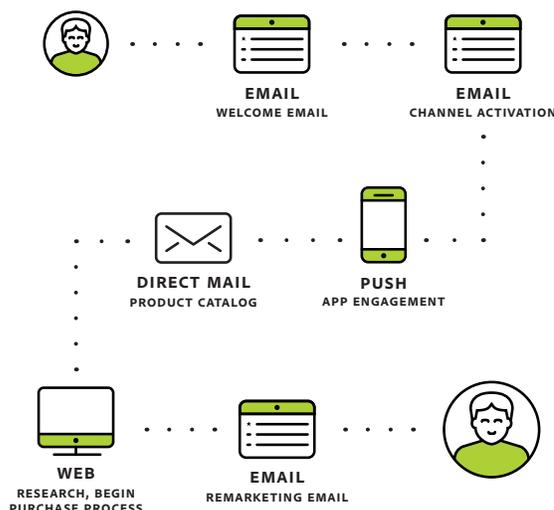
Obviously, native integrations with your different marketing workflows and solutions can reap the greatest values and returns. But it's just as important to have a robust set of APIs that provide flexibility and ease in integrating with the third-party marketing solutions you currently use, as well as those you might consider using in the future. To further ensure that flexible level of integration, look for vendors with established industry partnerships and a growing partner marketplace that offers a wide selection of third-party connectors, extensions, scripts, and apps that can enhance the extensibility and capabilities of your marketing campaign solution.

Such integrations help you avoid building a complex technical infrastructure to support your marketing efforts. That enables you to focus more on business, keep marketing teams in sync, and simplify customer journey management. Ultimately, those integrations need to let you map customer journeys and automate campaigns across online and offline channels and to seamlessly manage the entire customer journey from acquisition to retention and loyalty.

Customer-focused insights.

You need contextual insights into your customer interactions. You need to know where a customer is on their journey through the customer life cycle. Campaign management solutions should facilitate your ability to deliver relevant, personalized messages

for personalization that minimize the need to manually add placeholder text blocks or data syntax elements.

Similarly, can the solution tie into your marketing analytics? Will it enable you to target messages and campaigns in response to real-time triggers such as an abandoned cart? Does the solution have integrations that help drive personalization and engagement? Can it tie into your A/B testing and optimization solution to facilitate your ability to create more relevant and personalized experiences? For example, can it help you make sure the customer visiting your landing page or receiving a mass email is really eligible for the offered interest rate?

POTENTIAL GOTCHA:

A solution that claims 360-degree customer visibility, but only pulls data from a few data sources, cannot provide a complete unified customer profile.

What about integrations that simplify your ability to distribute content that has been customized for language, geographic region, or where particular customers happen to be in their journey? If you have a global campaign on your winter line of clothing, not only do you need to make sure the promotion goes out in the right language for each of the different locations, but you'll need different launch timeframes for customers in the northern and southern hemispheres.

Build an integrated customer profile.

EMAIL
WELCOME EMAIL

EMAIL
CHANNEL ACTIVATION

DIRECT MAIL
PRODUCT CATALOG

PUSH
APP ENGAGEMENT

WEB
RESEARCH, BEGIN
PURCHASE PROCESS

EMAIL
REMARKETING EMAIL

and help you identify the optimal channels for engaging each individual customer. Many solutions claim 360-degree customer visibility but actually fall short in giving you a unified customer profile that provides a complete understanding of your customers' preferences and behaviors along their journey across all touchpoints.

Things to ask about to gauge a solution's level of customer focus include: Does the solution provide a single accessible view of a customer's complete profile? Can it give you a complete contact history, so you can easily see all the ways a customer has been contacted via different channels in the past week, month, or

POTENTIAL GOTCHA:

Just because a solution says it supports data security and privacy doesn't mean it can deliver on the benefits of contact optimization.

year? Does it consolidate that history in way that lets you easily predict how the customer will respond to future campaigns? Can it consolidate channel preferences so you know how each customer prefers to be contacted and whether email or mobile will give you a higher conversion rate? Does it include both online and offline data in that consolidation? How in-depth is the detail it provides for all your customers?

When a solution falls short in providing such customer detail, it's usually because it only pulls customer data from a few sources, such as email and maybe a CRM system. To get a complete understanding of your customers, look for a solution that enables you to pull customer data from a wide variety of first-party and third-party sources. But that, on its own, is not enough. Even if the vendor claims access to a wide variety of data sources, you need to understand how easy or hard it is to pull that data into your campaign management solution.

Make sure you understand the cost and effort required to connect the solution to those data sources. What level of IT expertise and professional consulting assistance is required? What will it cost? What dependencies exist for getting the data? Is the data being pulled into the solution in real-time? Or do you have to continually request data updates on a per-project basis, creating IT or consulting engagements that further increase costs and leave you waiting for

the data you need? Preferably, you want a solution that can easily integrate with a wide variety of customer data sources with minimal assistance, process overhead, wait time, and cost.

At a minimum, a campaign management solution should help you address data security and privacy regulations (such as GDPR) compliance, but it really needs to go well beyond that with contact optimization. Contact optimization capabilities help you better respect customer preferences in regards to how often you contact them. You have a lot of messages you'd like to share with your customers, but too many messages can overwhelm and even annoy them. Contact optimization allows you to set up rules across different channels to limit how many messages get sent to specific customers over a certain period of time. Ideally, those rules give you flexibility in determining if certain types of messages should be exempt from that limit. Along with that, it needs to provide you with a single view of your campaigns across channels to help you spot inconsistencies or conflicts, foster alignment, and prioritize campaigns and message delivery in a way that conforms to customers' preferences.

Questions to ask:

What is the process for importing data into the solution and extracting data out of it? Who needs to be involved, what dependencies exist, and what are the time and cost expectations?

Questions to ask:

What are all the sources that the solution can pull customer data from, and how does it consolidate that data in way that provides a complete understanding of the customer?

A proven solution and marketing technology provider.

Campaign management technology has become critical in marketers' efforts to successfully engage customers across the mix of channels and devices in use today. The success or failure

of an organization's efforts to create positive, consistent, and relevant customer experiences rests largely upon its investment in campaign management and its relationship with the solution provider. You need a solution partner with a proven track record across the marketing technology spectrum that can deliver a holistic campaign management solution that addresses all the critical elements covered in this buyer's guide.

As a Leader in "The Forrester Wave™: Cross-Channel Campaign Management" and the Gartner "Magic Quadrant for Multichannel Marketing Hubs, Adobe Campaign offers best-in-class marketing technology that connects your online and offline marketing efforts to create seamless customer journeys. It empowers you to keep track of what your customers do and where they do it

no matter how and where they interact with your brand. It helps you build customer profiles from data gathered across all of your channels so you can better orchestrate campaigns across those channels, whether online or offline. And it does so in a way that lets you create a customized journey that is unique to each of your customers.

Adobe Campaign also gives you the flexibility and maturity your business needs as it evolves and grows. As an integral part of Adobe Experience Cloud, and with its robust APIs and third-party marketing integrations, Adobe Campaign makes it easy to create seamless, end-to-end campaigns that deliver value to your customers and return to your bottom line.

Learn more about how Adobe Campaign can help you create unified customer journeys that engage your customers at the right times, on all the right channels, and with the right content. Visit adobe.com/marketing/campaign.html