



B2B MARKETING

From insights to engagement: Transform your customer relationships with data.

An actionable guide for Adobe Analytics customers.



Bring value, or don't bring anything at all.

In this digital-first world, marketers must be able to engage their customers in meaningful ways at every touchpoint or they'll lose them—and all the data they've worked so hard to collect will go to waste.

The *2022 Adobe Trust Report* found that 72% of consumers say “bad” personalization makes brands less trustworthy. And more than half of consumers will stop purchasing from a brand that doesn't deliver meaningful personal experiences they value.

Marketers like you know how challenging it is to satisfy today's discerning buyers. Your team is doing its best to meet the growing expectations for personalized and relevant experiences in the moment. But you're competing for an increasingly finite supply of audience attention as prospects and customers are bombarded with marketing messages across new channels and digital media.



Delivering real value requires asking yourself: Am I truly engaging with my customers?

Engaging with value through personalized interactions instead of one-size-fits-all blast communications is key to winning over the hearts and minds of prospects and customers.

Most marketing leaders understand their customers' expectations have changed, but they struggle to find a step-by-step path forward for meeting those expectations. That's often because their organizations lack the insight to effectively customize and optimize the message. It's impossible to arrive at the "complete customer view" with incomplete customer data or data driven only by demographics no hub to centralize data around identities in an immediately actionable way.

As an Adobe Analytics customer, you are in the enviable position of having total control over data and insights. You're able to integrate data from all your digital channels, like web, mobile, IoT, app, social, video, and more. You can analyze the data in real time for a complete digital view of each customer, no matter how many customers you serve. You can even identify new customer behavior patterns and be on the forefront of emerging trends. But how well positioned are you to use all the data you've collected to power your marketing efforts and engage with customers in truly meaningful ways that drive conversions and sales?

True engagement marketing requires reimagining your marketing paradigm—stop thinking about the next message, campaign, or channel, and start listening to and learning from your buyers. Understand their full journey, from their first interaction to their most recent engagement, before you engage again. Analyze that engagement, and then repeat so you keep them coming back for more.

We've put together this guide to help you get started turning the valuable insights you've gathered with Analytics into customer engagements that convert.

What does it mean to engage?

“ It's emotional. It's visceral. It's more than selling, and more than marketing. It's looking into someone's eyes. Establishing a connection. It's hitting on the very thing they care about at the very moment it matters to them.

Steve Lucas
CEO, iCIMS

STEP 1

Listen: Know what each customer is telling you.

Is your marketing organization truly listening? Most marketers would say yes without hesitation. In a data-driven world, listening requires visibility across an expanding spectrum of channels and touchpoints so you can arrive at a complete view of customers.

Your goal: Go beyond saying, "We convert X percent of prospects" to, "This is what will get Sue, the head of HR at Company Y, to convert."

Take advantage of the tools in Analytics to measure your highest performing digital touchpoints and determine what makes them so effective. You'll want to gather and collate data from as many sources as possible to paint the richest, most complete picture of your prospects and customers.

While demographic information is helpful, if you want to understand what your customers care about, you also need to tune into how they interact or don't. The buyer's journey isn't linear, and cross-channel behavioral data is critical for understanding and acting in context. Consider your buyer's journey. What does their behavior tell you, and how does it change over time? Look for patterns and clues by listing all the channels where your target audience engages and mapping those to relevant behaviors. We've included examples on the left side of the chart below. Fill in the right side of the table for your organization.

Channel	Behavior	Channel	Behavior
Email	What days and times do I engage?		
	What haven't I opened?		
Web	What pages did I visit?		
	What blog posts am I reading?		
	What pages and blog posts am I not visiting or reading?		
Ads	Which programs did I click?		
	What device did I use?		
Sales	What did we talk about?		
	Where am I in the buying cycle?		

Listening in action.

Palace Sports & Entertainment

Palace Sports & Entertainment (PS&E)—which includes the Detroit Pistons, The Palace of Auburn Hills arena, DTE Energy Music Theatre, and the operating contract for Meadow Brook Music Festival—wanted to craft perfect event invitations. By listening to channels and behaviors (e.g., sales, services, ticket purchases, and so on), PS&E identified critical data, like a fan's favorite player, and which events or games they've attended. PS&E used this insightful data to keep fans engaged and create valuable content and offers.

The result: A 30% year-over-year increase in ticket sales.

Exercise

What insights can you draw from your data today? For example, "I can determine where my customer is in their buying cycle," or "I can find an interesting audience and then build a new campaign to specifically target this discoverable segment," or "I can use predictive modeling to identify the sales leads most likely to convert."



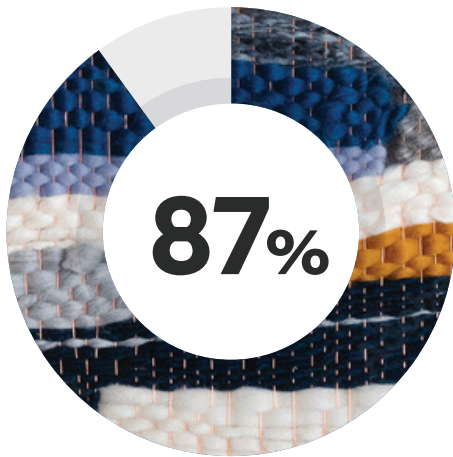
STEP 2

Learn: Find your truth.

Knowing where and how to cultivate and improve engagement isn't easy. Marketers who have succeeded have a map and a plan to turn data into insights. The answer isn't groundbreaking—you need a system of record for customer engagement.

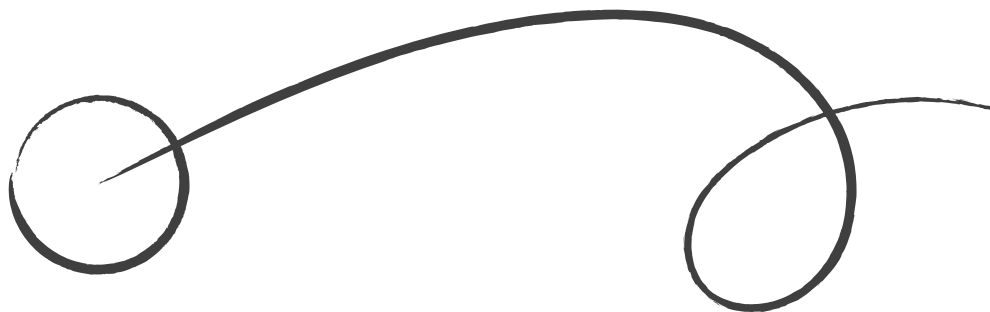
Because you're an Analytics customer, you're able to integrate and synthesize data across various systems. But a system of record for customer engagement isn't just about collecting data and extracting insights. It should also share insight and drive action at scale. That means it needs to be accessible to your whole team.

To ensure lack of access isn't a bottleneck for smarter engagement, you may need to revisit your organizational structure and make sure stakeholders align on reporting and analytics. Sales, marketing, and service teams must share real-time insights and develop a clear set of agreed-upon goals.



of sales and marketing leaders say collaboration between sales and marketing enables critical business growth.

Source: LinkedIn



Create a system of record for customer engagement.

Hands-on exercise #1

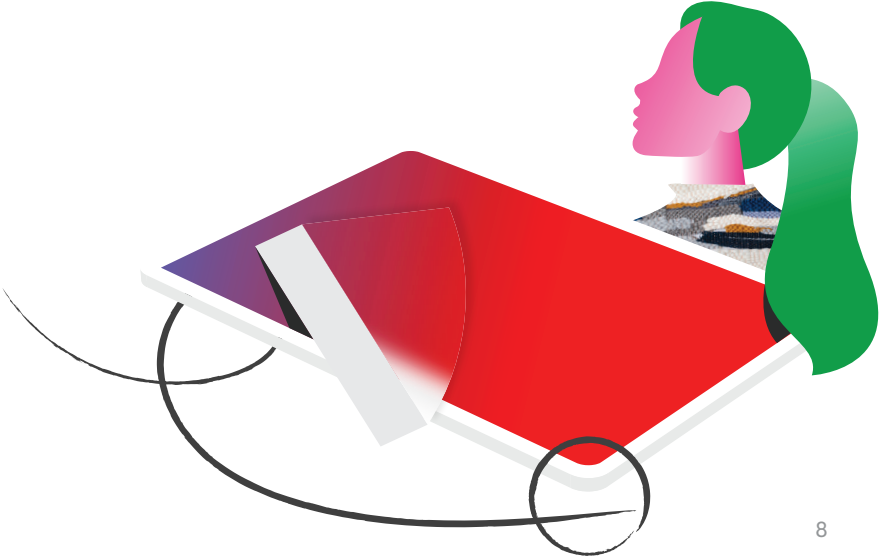
What would a single 360-degree view of your customer look like? What behaviors or preferences would you want to see all in one place?

To jump-start your analysis, consider this example of what a SaaS company needs to know about a prospective customer: their role in the buying process, their role in using the SaaS product, their communication preferences, and any marketing and customer service touches. Have they participated in a trial software usage, completed onboarding, provided in-product feedback, used a certain feature, added a team member, or integrated with a third-party service?

Create a system of record for customer engagement.

Hands-on exercise #2

How are customer insights shared across your organization today? How could you improve accessibility to these insights? Be sure to look for insights in tools outside of marketing and sales, especially for renewals, cross-sell purposes, and up-sell purposes.



Make insights actionable.

Hands-on exercise #3

What specific insights would you like to know, and what tests would you like to run to target your prospects and customers better? By listening to its target audience of potential students, Walden University realized email was not an effective way to engage all individuals at every stage of their journey. To reach them better, they created a mobile marketing process using Adobe Marketo Engage to send SMS messages to prospective students at just the right moment in the journey.

Discover the story behind the data.

Walden University used marketing automation to personalize its outreach, but that's not all they can do with Marketo Engage. They can also flow data from Marketo into Analytics for a full view of the customer journey. And so can you.

You can bring in pre-click campaign and email data and combine it with post-click activity on your website and app for a better understanding of each customer's journey. This allows you to follow up with relevant content and guidance for the next best steps. For instance, let's say you're a marketer at a landscape supply company and you send an email advertising lawnmowers to a target list of lawncare companies. Susan, a customer, clicks on your email but ends up looking at drills on your website. She even puts one in her cart but leaves the site without making a purchase. Because your email data is synced with your website data, your automated marketing platform can send Susan a personalized email with a 10% discount on drills.

STEP 3

Personalize at scale: Automate actionable insights.

You have a deep understanding of each customer's needs, preferences, and desires.

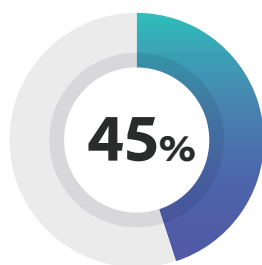
- Do you have the same depth of understanding when it comes to the complex buyer journey?
- Do you know which content converts?
- Do you automate marketing campaigns and activity throughout the entire customer lifecycle?

If you answered no to any of these questions, then your analytics aren't living up to their full potential.

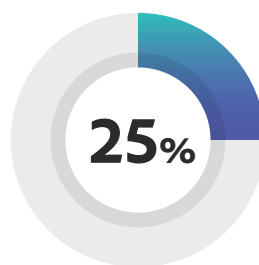
A marketing automation tool realizes the true power of analytics. Marketing automation platforms manage email marketing, landing pages and forms, campaign management, lead nurturing and scoring, lead lifecycle management, customer relationship management (CRM) integration, social media marketing, and marketing analytics.

When you automate your marketing activities, you free your team from time-consuming repetitive tasks that take them away from the strategic work that delivers true ROI. With marketing automation, you increase the scope of your campaigns and achieve personalization at scale without increasing the size of your marketing department.

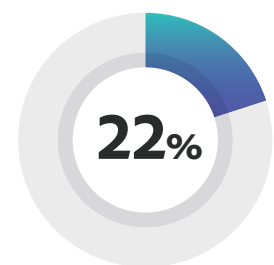
The ROI of marketing automation.



Pipeline growth

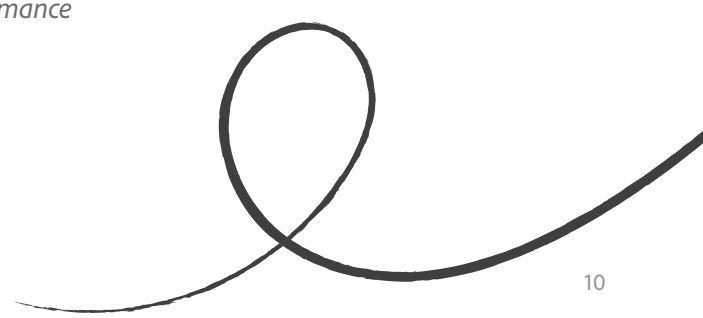


Higher revenue



More time selling

Source: Adobe Marketo Engage Benchmark on Revenue Performance



When Analytics is paired with an equal caliber marketing automation tool (and yes, we're talking about Marketo Engage), you can see which efforts are most effective at engaging target accounts. You also gain detailed insight into how different content performs at each stage of the buyer journey. From there, you can act on those insights to create new and powerful audience segments to precisely target prospects and deliver meaningful—and fully personalized—experiences across every channel. It makes your email marketing, pay-per-click advertising, and social media publishing efforts so much more effective because you can measure your performance metrics at every step.

Exercise: Automating your marketing.

Does your company have a marketing automation system that can take your Analytics data and use it to hyper-personalize content and campaigns? Let's find out.

Marketing Automation Capabilities	Yes	No
Send tailored marketing emails to target audiences		
Pre-schedule an email funnel for an event and then automate delivery		
Automate the publication of social posts at optimal engagement times		
Launch relevant, targeted content the instant a prospect expresses interest		
Whip up new landing pages for each campaign in a flash and optimize for conversion		
Automate campaigns across all channels—from direct mail to phone to online to social		
Filter leads by likelihood of engagement and brand interest		
Identify trends and use this data to target audience segments		
Continually test and optimize paid ads, landing pages, and product pages		
Identify the top attrition point in your marketing funnel and make necessary adjustments quickly		
Measure the ROI of each of your marketing campaigns against business goals		
Connect your pre-click and post-click data for a complete view of your customers' journeys		

STEP 4

Collaborate: Build a partnership with sales.

Aligning marketing and sales teams increases sales, lowers cost per lead, and makes it easier to measure impact across every channel. On average, only 20% of prospects are ready to buy on first touch. Marketing automation helps you filter through prospects who are unlikely to convert, so you can focus your efforts on nurturing viable leads and preparing them for a relationship with the sales team.

To do this, you'll need a marketing automation solution that's sophisticated and flexible enough to provide detailed insight into prospect behavior and the sales pipeline. Then you'll need to integrate this technology with your CRM so you can automatically alert sales, recycle leads, and establish service level agreements.

Exercise: Partnering with sales.

How can you strengthen your partnership with sales? For example, "My organization can invest in a marketing solution that utilizes behavioral lead scoring to identify prospects that are ready to engage and purchase."

STEP 5

Engage: Personalize throughout the lifecycle.

Once you've listened to each customer and learned what each wants, it's time to engage with value. According to our research, irrelevant content is the number one reason customers aren't engaging. The secret to breaking through is to get personal through a virtuous cycle of listening and learning that leads to engagement.

A single story won't land with everyone in your audience. You need to adapt the story to keep it engaging by understanding which content and story elements resonate with each person, where each person wants to be engaged, and when. In other words, you need to make stories relevant, personal, and timely throughout the customer's lifecycle.

United Heritage Credit Union (UHCU) serves military personnel and their families and needs to engage its members continually. Listening and learning has led to a realization that one of the most important times to engage members is when they've recently joined. New members are nurtured with a welcome sequence, which leads to cross-channel behavioral awareness that corresponds with and adapts to member actions—for example, identifying and targeting people who are looking for specific types of loans. These campaigns have driven up the number of new loans substantially.



Exercise: Engaging with stories.

Rate how actionable and personalized your view of the customer is, based on the following areas.
(This example is based on a SaaS application provider.)

Capacity to optimize the timing of relevant offers based on customer insights

(For example, the SaaS provider learned that the best time to engage is when users are in the product.)



Capacity to deliver personalized content based on customer intelligence

(For example, the SaaS provider created a campaign for new users based on the features they were using.)



Capacity to deliver timely offers based on changes in customer behavior

(For example, the SaaS provider timed weekly communications based on where the user was in onboarding and product usage.)



Exercise: Adapting for relevance.

You must listen and learn continuously to adapt your story for the individual. List small changes you can make in the following areas to improve the outcome of your marketing.

Content: Where could you improve on topical relevance? (e.g., industry, product, or pain point)

Channel: Which channels could you effectively adapt content through? (e.g., website, newsletters)

Cadence: How could you ensure an optimized communication cadence for customers?
(Do you have a preference center?)

Transform your relationship with customer data.

The only way forward is to laser-focus on personalization in each conversation with individual prospects and customers. As a marketing leader, you must push back fearlessly on the “one more send” mentality and transform the way your organization ingests and uses customer data to produce relevant, valuable experiences across the channels that matter. The formula for doing this is simple—listen, learn, customize, collaborate, and engage.

To listen, your marketing organization needs to:

- Think strategically about how your martech stack empowers customer understanding on an individual level.
- Know how people (not just segments) behave.

To learn, your marketing organization needs to:

- Create a 360-degree view of each customer that centralizes real-time data around an individual profile.
- Share insight in a way that puts data-driven decisions within reach for the whole marketing team—beyond your data specialists.
- Take action on an individualized level, often in an automated way.

To personalize at scale, your marketing organization needs to:

- Leverage your collected data to power your marketing efforts and create experiences that keep customers engaged and coming back.
- Simplify both the complex customer journey and the content creation process.
- Invest in a marketing automation tool that integrates with the rest of your martech stack and with Analytics.

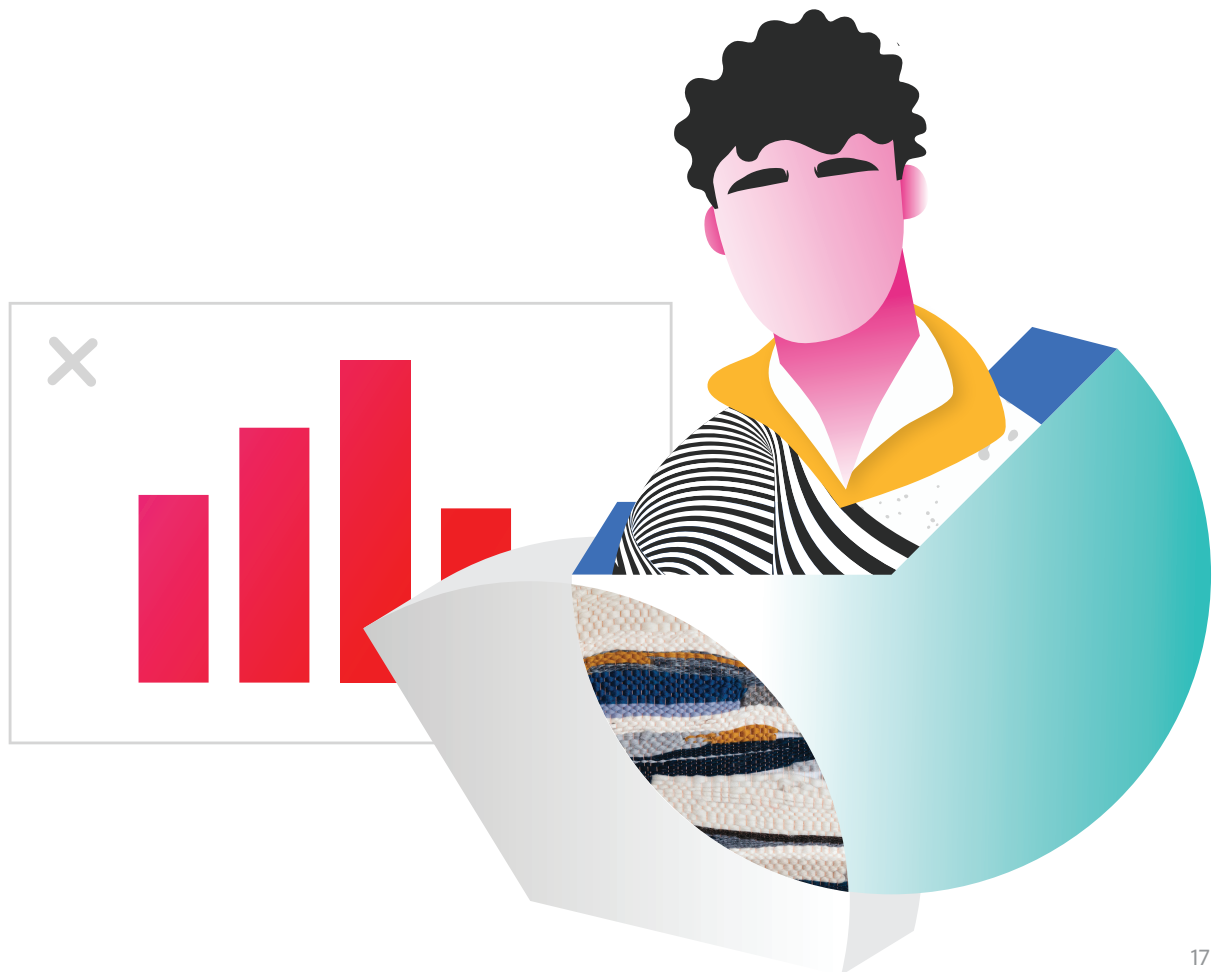
To collaborate, your marketing organization needs to:

- Increase alignment with sales and enhance sales performance with better vetted leads and data sharing.
- Integrate your marketing automation platform with your CRM.

To engage, your marketing organization needs to:

- Develop, test, and deploy the relevant messages for customers—optimizing the right message, in the right place, at the right time.
- Adapt over time to an individual's behaviors or preferences at massive scale, using learning systems like artificial intelligence (AI) on a campaign level to create segments of one.
- Expand your marketing efforts to follow a customer's lifecycle by anticipating and responding to their needs beyond a point in time.
- Orchestrate engagement programs in partnership with sales, delivering value and consistency at every touchpoint—especially the brand-defining human touches.

By working through the exercises in this guide, you will uncover all of your organization's listening opportunities, identify what is needed to establish a useful learning infrastructure, develop a plan to automate personalization efforts, increase collaboration between sales and marketing teams, and put in place a foundation to engage at scale effectively.



Adobe can help.

When your marketing platforms and solutions don't communicate, the customer experience—and your bottom line—suffer. Pair Marketo Engage's robust dataset with Analytics to measure the account journey accurately and get account-based insights. Analytics, Marketo Engage, and Marketo Measure (previously Bizible), the industry's number one B2B marketing attribution solution, are built for integration with each other and with the rest of your martech stack. And because Marketo Engage and Analytics are part of the Adobe tech stack, you get the full benefit of Adobe's AI and machine learning technology to support a virtuous cycle of analysis, insight, and execution.

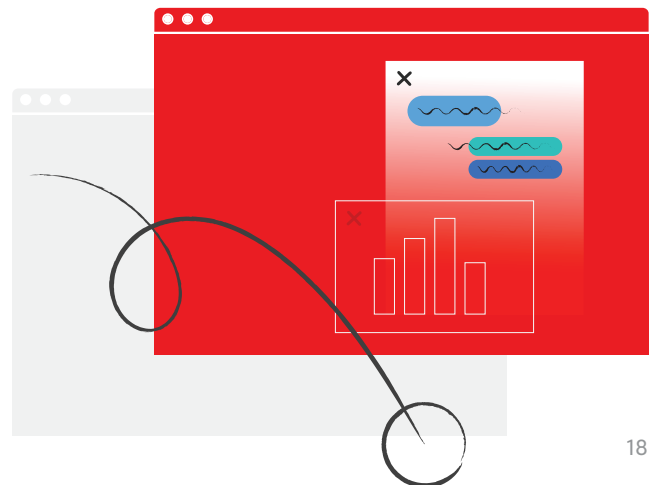
[Learn more](#)

Adobe Marketo Engage

Adobe Marketo Engage specializes in customer engagement for complex B2B buying journeys. As a complete solution for lead management, it brings marketing and sales together to nurture leads, orchestrate personalized experiences, optimize content, and measure business impact across every channel. It natively supports both demand- and account-based marketing strategies, providing a single, integrated lead management platform from acquisition to advocacy. Build engaging, personalized experiences at scale and prove impact with Adobe Marketo Engage.

Adobe Analytics

Adobe Analytics turns real-time data into real-time insights. As more than a web analytics solution, it takes data from any point in the customer journey and turns it into an insight that guides your next action. Backed by Adobe Sensei, Analytics uses AI to deliver predictive insights based on the full scope of your data. View and manipulate data in real time. Discover what's working with attributions, and make more informed decisions with help from Adobe Analytics.



Sources

- 1 [“2022 Adobe Trust Report,”](#) Adobe, March 2022.
- 2 [“Data-Driven Marketing: A Research-Based Guide for Marketers,”](#) Ascend2, October 2021.
- 3 [“The Art of Winning: Orchestrating Marketing and Sales to Deliver the Ultimate Customer Experience,”](#) LinkedIn, 2020.
- 4 [“The Definitive Guide to Marketing Automation,”](#) Adobe Marketo Engage, 2021.



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