

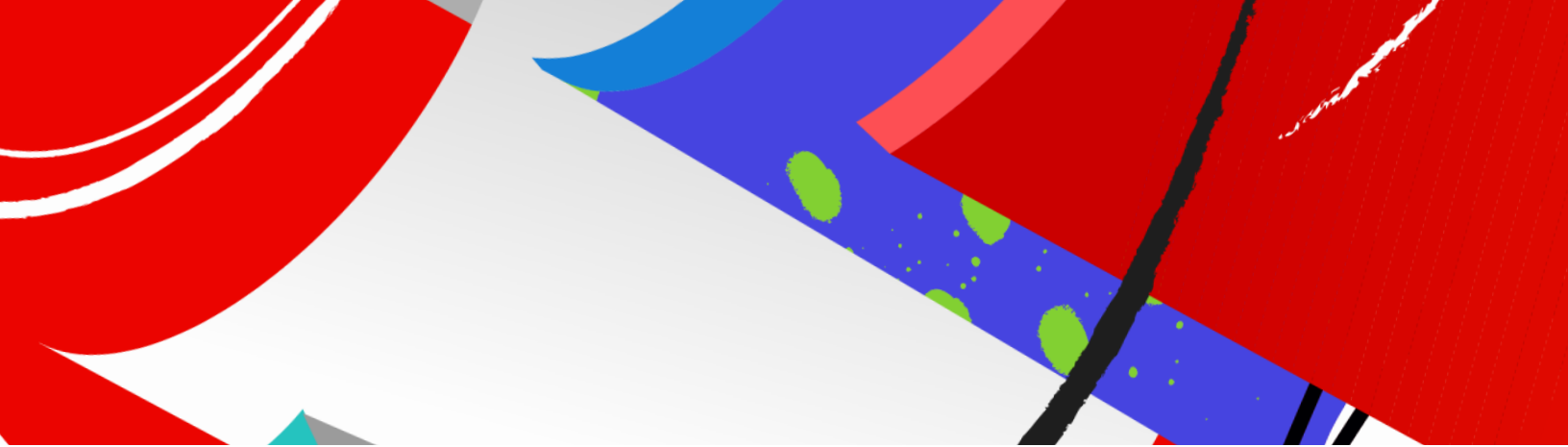


B2B MARKETING

From insights to engagement: Transform your customer relationships with data

An actionable guide.





Introduction

Build a business case for value-based engagement

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

Adobe Marketo Engage research found that 75 percent of customers expect you to have a deep understanding of their needs in order to engage them successfully, and 65 percent of them said you need to do a better job aligning to their preferences. No one said they want more volume—but “one more send” is often the answer when we don't know whether we're truly engaging. Especially since the incremental cost of that extra email, post, or call is essentially zero.

Delivering real value requires that you ask yourself: Am I truly engaging with my customers?

Engaging with value through personalized interactions instead of volume and one-size-fits-all communications is just the first step in winning over the hearts and minds of prospects and customers. Yet only 33 percent of customers believe brands are even trying to deliver value.

Most marketing leaders understand their customers' expectations have changed, but they struggle to see a step-by-step path forward for meeting those expectations. That's 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 or demographic-driven-only customer data—and no hub to centralize data around identities in an immediately actionable way.

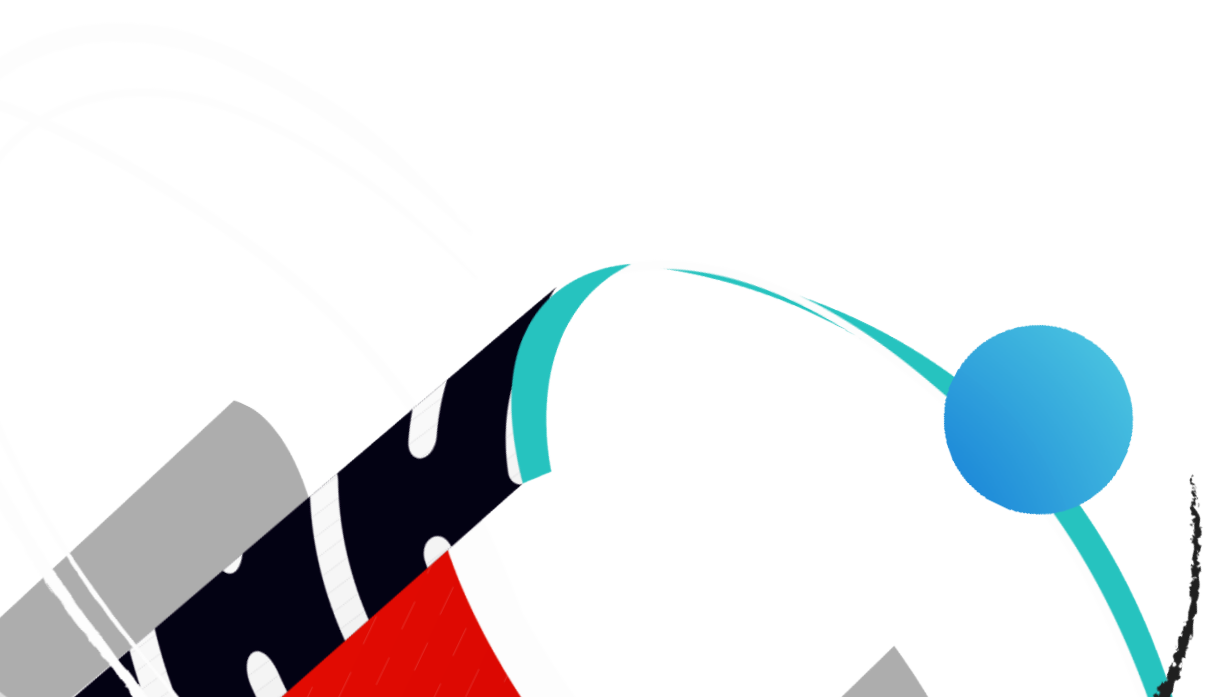
There is no shortcut. True engagement marketing requires you to reimagine your marketing paradigm—stop thinking about the next message, campaign, or channel, and start listening, learning from your buyers, and then engaging. How do you get started?

Building a business case for change and enacting that change starts with finding, harnessing, and activating your valuable customer data. This guide will help you get started down the path of turning data into engagement.

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: What is each customer telling you?

Most marketers would say yes without hesitation. But is your marketing organization truly listening? 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. Unfortunately, according to McKinsey, “Many companies have the elements of a relatively complete view of the customer already. But they reside in discrete pockets across the company.”¹

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.”

Your first step to understanding your audience in a data-driven way is to think through all the sources for mission-critical data about your prospects and customers. List all the marketing channels and other touchpoints (e.g., sales reps, customer service, CRM system) where you discover insights about a single person.

Fill out the table below, expanding it as needed.

Marketing channels	Other touchpoints

Remember: You almost certainly are suffering from data gaps. 54 percent of companies say their biggest challenge to data-driven marketing success is the lack of data quality and completeness, per Ascend2. With that in mind, search for all the data sources you are have previously overlooked, or you are not effectively capturing and aggregating the data. Start by listing the types of information you need to know to best engage and convert your prospects into customers. Then identify where this data lives and who owns it. We’ve included a few common examples to get you started on the following page.

¹ McKinsey & Company, The heartbeat of modern marketing: Data activation and personalization, March 2017.

Relevant data points	Data source	Data owner
Industry	Marketing automation and CRM systems	Marketing/sales ops
Role/title	Marketing automation and CRM systems	Marketing/sales ops
Role in purchasing process	Marketing automation and CRM systems	Marketing/sales ops
Installed products	Third-party database	Third-party vendor
Product usage	Product database	Product management
Engagement score	Marketing automation system	Marketing
Sales stage	CRM system	Sales ops
Intent data	Marketing automation system	Marketing/third-party vendor
Propensity data (i.e., predictive data)	Predictive analytics	Data scientists/third-party vendor
Personal data (i.e., birthdate)	Marketing automation system	Marketing/third-party vendor

Your goal: 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. What does their behavior tell you, and how does it change over time? The buyer's journey isn't linear, and cross-channel behavioral data is critical for understanding and acting in context. What is their behavior telling you? Look for patterns and clues by listing all the channels where your target audience engages and mapping those to relevant behaviors. Consider your buyer's journey. We've included examples on the left below. Fill in the right side of the table for your organization.

Channel	Behavior	Channel	Behavior
Email	What days/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 circle?		

Listening in action

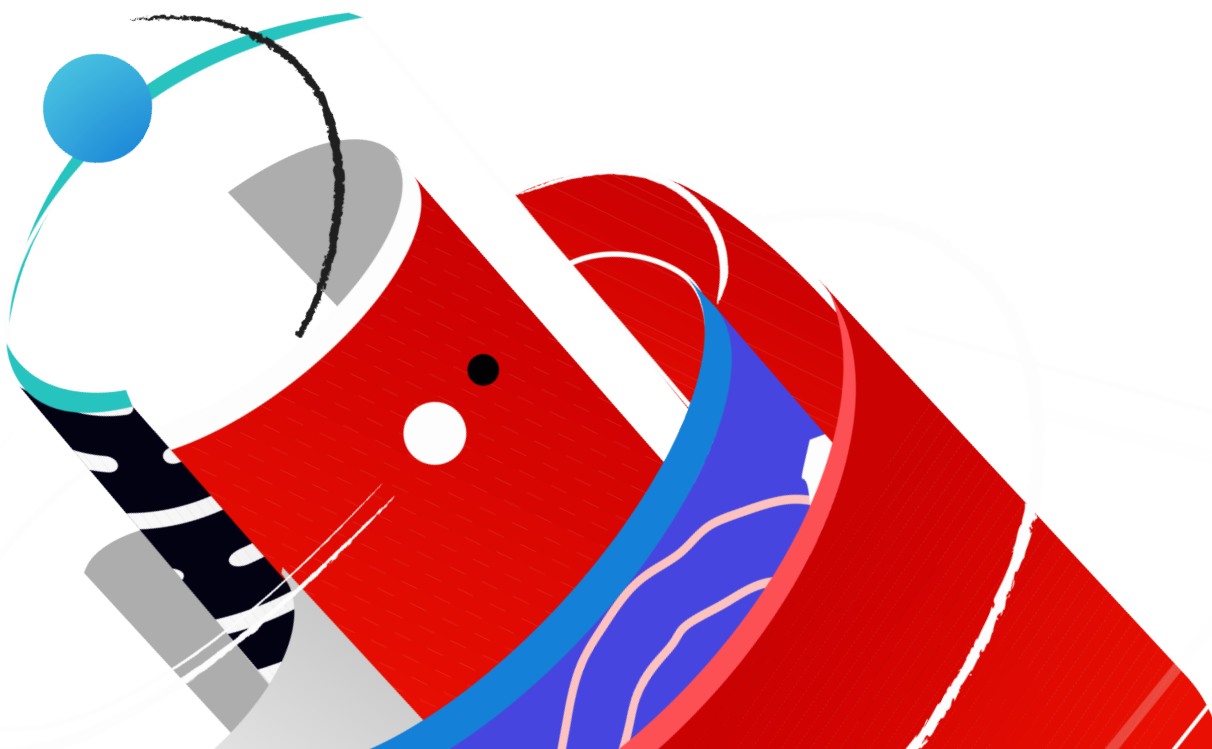
Palace Sports & Entertainment

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, etc.), 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 to create valuable content and offers.

The result: A 30 percent 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.



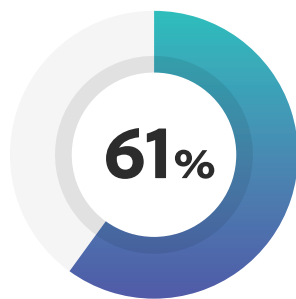
Step 2

Learn: Are you turning data into insights?

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 to create a single source of truth. As Gartner says, "Marketers need integration and coordination among systems to manage and optimize individual dialogs in real time, across channels, devices and contexts, on a continuous basis."

But this goal still eludes most organizations. According to the CMO Council, only 6 percent of marketers believe they are able to get a complete view of their customer from all available data sources.²

A single source of truth isn't just about collecting data and finding insight. 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 look for technologies that surface insight to the right stakeholders at the right time.



of marketers reported that marketing and/or IT are being reorganized to better leverage marketing technology.³

² CMO Council, Empowering the Data-Driven Customer Strategy: Addressing Customer Engagement From the Foundation Up, 2017.

³ Marketing Organizations in the Age of MarTech 2017, Chiefmartec.

Step 3

Engage: Are you personalizing 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 getting personal based on 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), which serves military personnel and their families, needs to continually engage their members. 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 behavioral nurtures across channels, which correspond with and adapt to member behaviors—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 an SaaS application provider.

Capacity to optimize the timing of relevant offers based on customer insights (i.e., SaaS provider learned the best time to engage is when users are in product)



Capacity to deliver personalized content based on customer intelligence (i.e., 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 (i.e., SaaS provider timed weekly communications based on where user was in onboarding and product usage)



Exercise: Adapting for relevance

You must continuously listen and learn 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?)



Conclusion

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 fearlessly push back on the “one more send” mentality and transform the way your organization ingests and uses customer data to engage with relevant, valuable experiences across the channels that matter. The formula for doing this is simple—listen, learn, engage.

To listen, your marketing organization needs to:

- Thoroughly understand where mission-critical customer data lives (often beyond “marketing-owned” channels, requiring cross-functional collaboration)
- Determine what data is needed and fill gaps
- Think strategically about how your technology stack empowers customer understanding on an individual level—in other words, knowing 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 engage, your marketing organization needs to:

- Develop, test, and deploy the right 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 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 can uncover all your organization's listening opportunities, identify what is needed to establish a useful learning infrastructure, and put in place a foundation to engage effectively at scale.

About 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.



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