Charting a <u>course</u> for an exceptional *customer experience.*

Best practices for navigating your teams through a cross-channel transformation.

Whether it's navigating a ship around the globe or plotting your way through a successful cross-channel evolution, every journey worth taking requires effort. The journey to creating a customer-centric organization is no different.

Just as a captain charts a course to their destination and prepares the ship and crew, you need to prepare your organization as well. To become a customer-centric business and bring more of your various marketing efforts into closer alignment, it's important to get organization-wide buy-in, secure the appropriate budget to fund the initiative, to understand your different audience segments and what they care about, and understand what features in a cross-channel marketing solution will best help you to reach your destination. If you've completed these steps, you're ready to set sail with a cross-channel transformation. If you haven't, consider reading our first article, "Making the cross-channel commitment," before you continue.

> ## To become a customer-centric business, it's important to get organization-wide buy-in, secure the appropriate budget, to understand your different audience segments, and understand what features in a cross-channel marketing solution will best help you to reach your destination.

Once you've prepared your organization and set your sights on your true North Star—the customer experience—it's time to head into uncharted waters. When the Walt Disney Company began their cross-channel journey, for example, they knew that the challenges they faced would be both technical and organizational and that they would need to be mindful in how they approached these challenges. But by engaging in best practices to design their organization for cross-channel success, such as creating centers of excellence and engaging external support, Disney was able to achieve 100 percent IRR (internal rate of return) through their outbound marketing channels and deliver exceptional customer experiences, inside and outside their parks and resorts.

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As you begin your own journey of becoming a customer-centric business, we want you to achieve the same successes we've seen our customers achieve. To ensure smooth sailing with your cross-channel marketing solution, here are three best practices, based on the experience of our most successful customers, that can help you stay focused and progress with confidence toward your final destination—improving your marketing and customer experience efforts by bringing your data, content, and cross-channel delivery capabilities into closer alignment.

Find the right <u>crew</u>
for the *journey.*

A captain needs experienced sailors to sail a ship, especially when encountering rough seas or navigating unexplored waters. Similarly, while you may be in uncharted waters when it comes to aligning your marketing channels and activities, a key part of your success will depend on having the right people onboard to help steer you to your goal. The greater the technical proficiency and experience with digital technologies including email, web, mobile, and social that your team members have, the better.

"People are not your most important asset. The right people are."

Jim Collins
Author of Good to Great: Why Some Companies Make the Leap…and Others Don't

Having strong analytical skills and the ability to process significant amounts of data is also important in a marketing organization that is focused on the customer experience. If these skills are currently lacking, you may need to cultivate them through re-training, hiring talent, or bringing in outside expertise. Sometimes a combination of all three can work well.

One way to facilitate better customer experiences and the evolving roles your team members may need to fill is to conduct a skill set audit. This will allow you to not only uncover where the gaps are, but to find out what people want to know and then give them the opportunity to learn.

For example, National Australia Bank's Adobe Campaign implementation involved getting 70 people across different teams aligned and onboard. This required assessing everyone's skills to determine who would fit best where, as well as to determine which new skills were missing. Greg Moore, senior consultant of communications capability, customer data, and analytics at National Australia Bank, notes that the responsibility for analytics, campaign building, creative design, and legal approvals, was covered by the main

marketing team. Meanwhile, business technology partners were brought in to help National Australia Bank integrate Adobe Campaign with their mobile banking app, using the Adobe Mobile SDK.

One situation that the audit might uncover is that the right skills are *already* present in your organization, but they are not brought in to the marketing decision-making process. For instance, in many organizations with mobile apps or existing mobile marketing efforts, mobile programs are often run through IT—a team that in many cases isn't well integrated with marketing. So a best practice to improve collaboration and coordination when bringing together mobile marketing efforts and email, web, and offline marketing activities is to work off a common data set with full reporting and multitouch attribution across a variety of channels.

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Redtag.ca experienced the benefits of such an approach. Through an integrated evaluation of cross-channel data, they discovered that while their customers did a lot of travel research on mobile devices, they ended up booking most trips from their desktop web browser. In many organizations, these two channels are run and measured separately, which may make it look like web is bringing in the revenue. By using Adobe Campaign's unified customer profiles to help teams in their organization connect the dots, Redtag.ca was able to understand that the two channels are complimentary and fulfill equally important parts of the cross-channel journey.

Recommended key roles for Adobe Campaign.

As you work to get the right skills and team members in place, keep in mind that you can create as many roles and skills as needed to fit your organization—but the following are recommended for every organization.

ROLE	SKILLS	TRAINING NEEDED
Designers of creative	HTML, images, graphics	Limited Adobe Campaign training needed
Campaign manager (strategic, critical role)	Project management, communication, planning, coordination	Overview knowledge of Adobe Campaign
IT developer/staff	Data sources, integrating data, data synchronization, Data Warehouse	Overview knowledge of Adobe Campaign
Marketing practitioners	Uses adobe campaign daily, picks and runs workflows, sends proofs, schedules deliveries, reports	Practitioner-level Adobe Campaign training

ROLE	SKILLS	TRAINING NEEDED
Delivery designer (basic developer)	Create basic workflows, personalization, create audiences, create basic templates	Extensive Adobe Campaign training on design, orchestration, development, planning, and programming
Delivery designer (intermediate developer)	Basic—understands data modeling, SQL, logical skills, more complex workflows	Extensive adobe campaign training on design, orchestration, development, configuration, and management
Delivery designer (advanced developer)	Intermediate—APIs, coding; constructs complex workflows and templates; data management, advanced logic rules and personalization	Extensive Adobe Campaign training on design, orchestration, development, configuration, management, and customization
Administrator	Detailed, follows procedures, basic logic skills	Extensive Adobe Campaign training on design, orchestration, development, planning, and programming

Structure your <u>teams</u> for smoother *sailing.*

Navigating in uncharted waters is always tricky, but the crew can achieve smooth sailing when they collaborate and coordinate. The same is true when undertaking the ambitious change-management effort of uniting disparate marketing teams under the same flag of customer obsession.

In many large organizations, marketing teams may be set up regionally or by channel, which can create silos and barriers to effective cooperation. Redtag.ca, who initially sold travel packages through their brick-and-mortar stores and now uses email, mobile, web, and in-store, discovered that as they transitioned to more digital channels, breaking down organizational silos and sharing data across channels enabled them to perform better offline too. For instance, they

used digital data to determine that their Toronto bus stop summer advertising campaign should focus on Jamaica, not Cuba, as was originally intended, because the data showed that in the Toronto area more customers searched for information on Jamaica holidays.

To encourage better teamwork and alignment of goals, it's important that all teams have an overarching strategic objective and are incentivized to reach that objective through collaboration, not competition. If an organization incentivizes teams based on conversion rates, each team will be focused on getting the most conversions, not collaboration or improving the customer experience. It could even mean that teams refuse to share lists or data, and the customer experience suffers due to lack of coordination and consistency in the communications the customer receives.

"Customer experience is an organizational change initiative— an ethos, a culture. If it's only talked about within the marketing or IT organizations, it will not be successful."

Cathy McKnight
Industry Analyst and Partner, Digital Clarity Group

As we mentioned earlier, Redtag.ca discovered the importance of sharing data across channels firsthand. They realized that their customers now interact with the brand through multiple channels. But initially, profile data wasn't consolidated across channels. And, as a result, Redtag.ca struggled to achieve the fine-grained customer personalization they hoped for. This need led Redtag.ca to expand its digital marketing platform to include Adobe Campaign within Adobe Marketing Cloud.

"Having Adobe Campaign and Adobe Analytics work in tandem helps us make sure we are delivering the best experiences possible across touchpoints."

Roberto Gennaro
Chief Digital Officer, Redtag.ca

As Redtag.ca realized, it's effective to focus on the customer experience first. Success metrics should still align with organizational goals such as increasing C-Sat or NPS scores, revenue, customer lifetime value, or repeat purchases, but there should be an incentive to work together to create the best experience possible. To do this effectively requires courage and vision at the executive level, as well as effective change management.

Organizations have tried different strategies to foster change management and encourage collaboration and better goal alignment. While every organization has different needs, here are three options we've seen work well in successful organizations:

Center of excellence.

To test the waters, many organizations start with small, focused, cross-channel marketing technologies and tactics to prove out the model and demonstrate a clear ROI before circulating and promoting this approach to other teams and different parts of the company. A center of excellence (COE) can be used to help organizations expand from a small effort to larger organizational-wide change management. It can help you to oversee different areas of governance, including documenting existing processes and dependencies before, during, and after implementation. In organizations where there are specialists in different areas that don't necessarily report to the same person or operate in the same geographic region, a COE can be particularly useful to collaborate on best practices and share how different teams are implementing and using campaign management tools like Adobe Campaign successfully.

Cross-journey teams.

Cross-journey teams take a non-traditional approach to the customer journey. Rather than focusing on a channel, such as email or mobile, a cross-journey team is responsible for creating an end-to-end journey for a key audience across channels, devices, or touchpoints. For example, one retail bank's cross-journey team manager for loan products identified that the mobile loan

application process was more difficult than the same process on other channels. By identifying, testing, and remedying the issue, mobile loan applications increased by 20 percent.

Having teams responsible for looking at the entire customer experience rather than the channel allows the team to better collaborate on how to create a consistent, unified experience across the entire journey. And it helps eliminate the types of silos many organizations struggle with when teams are organized solely by channel.

Agile marketing teams.
Customers expect almost-instant interactions. Organizations that deliver better customer experiences have found that implementing agile marketing can help them be more responsive. Agile marketing takes its cue from the software development approach of managing work through a process called Scrum. The intent of this process is to work in short timeframes, known as sprints, to better align with the business aims of the organization and increase the speed and responsiveness of marketing. The highest priority of agile marketing is to satisfy the customer through marketing that solves problems and creates value for the customer. With the ability to quickly respond to feedback and change, agile teams can be more competitive and better deliver what customers want.

However, it can be disruptive to implement agility across teams. So we've seen this team structure work best with organizations that have a strong foundation of data, marketing technology, and capabilities before investing in agile marketing.

<u>Don't</u> go it *alone.*

"**Driving change is the hardest part. You have a lot of people who don't want to let go of their tribal knowledge. If you're patient, persistent, holding your partners and yourselves accountable, you can be successful in these journeys.**"

Chris Taylor
Director of Customer Engagement Platform, The Walt Disney Company

Even the best captain can, at times, find that extra support—whether that's a tugboat pulling them ashore when the waters are shallow or simply getting additional supplies at a port along the way—can be instrumental in allowing them to complete their journey as quickly as possible.

You can also enhance your cross-channel journey by having additional guidance and expertise. Here's a look at the different options Adobe Campaign offers:

Ongoing services.

Ongoing services are intended to help customers with smaller issues and are self-serve. You can start with free or standard custom training options, such as Adobe Digital Learning Services, or you can use the [Experience League,](#) our community and self-learning forum. Another option is to bring in an Adobe technical account manager. Technical account managers are most useful when you're trying to transition from a full-service model, where an outside agency is hired to run and operate your campaigns, to a more self-serve model, where your organization brings more of these activities in-house.

Implementation services.

For more hands-on support during implementation, we offer customers the option to work directly with us or with one of our global, specialized partners. In addition, there is flexibility for customers to operate Adobe Campaign themselves, to work with partners on specific initiatives, or to hand off everything to a full-service agency.

One implementation option for assistance that has been highly successful is desk-side coaching. Tony Arbelaez, senior technology manager for the

Travelocity brand, engaged our desk-side coaching services to help expedite their implementation of Adobe Campaign. This service provided Travelocity with an Adobe implementation team member who sat down with Travelocity's own team and walked them through the process of building out their next campaign using initial templates that were Adobe-built for Travelocity. Because his team was more technical, this strategy was highly effective in bringing them quickly up to speed on how to best use Adobe Campaign.

"The trainer was explaining what he was doing as he was live converting our campaign, and by the end of that week, my team and myself, we had already completed the conversion of two other campaigns because we watched him do that."

Tony Arbelaez
Senior Technology Manager, Travelocity

Additionally, documenting steps along the way, whether it's through desk-side coaching or as your team develops their own processes and workflows, is important. It will help you develop and share resident knowledge that can be used to improve hiring, onboarding, and employee productivity.

As Disney embarked on their journey to cross-channel success, they also sought out external guidance and support. They partnered with us and with Merkle, a performance marketing agency and specialized Adobe Campaign partner, for help with deployment and scaling of Adobe Campaign. Because they were deploying Adobe Campaign in a hybrid architecture, they also partnered with IT for assistance, to ensure that they had the appropriate hardware and systems in place to support their data governance and privacy practices.

By being willing to look to external and internal experts for support, Disney was able to incorporate best practices and standards and find success more quickly. This includes already deploying over 200 million emails, automating over 20 ongoing and recurring tactics on Adobe Campaign, and achieving a 54 percent reduction in baseline operating expenses.

54%
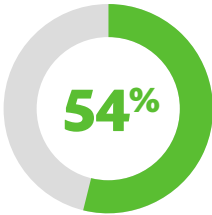
Reduction in baseline costs through incorporating best practices with Adobe Campaign

Successfully <u>chart</u> your cross-channel *course.*

> **"For me, it was just having one tool, one workflow, doing one execution across multiple channels."**

Saul Lopez
Customer Lifecycle Lead, Virgin Holidays

Each organization's digital maturity will be different at the start of implementing a cross-channel solution. Thus, different levels of organizational cultural change will need to occur. Furthermore, because every organization's culture is unique, there is no one-size-fits-all approach to implementing a cross-channel solution. What is important, however, is that you assess your organization's current culture, digital maturity, and organizational structure to determine where and what changes are needed to support a cross-channel, customer-focused experience.

Results of Virgin Holidays centralizing their system with Adobe Campaign.

33%
increase in revenue

66%
increase in awareness

50%
increase in retail appointments

Disney, Travelocity, National Australia Bank, Redtag.ca, and other customers have all taken the time to step back from the process, find their North Star, and intentionally design their organizations for cross-channel success. BT, a world-leading telecommunications provider, has reduced friction in the decision-making process between marketing teams by using the data collected by Adobe Campaign to "take opinion out of disagreements." As a result, they've seen their email rates go up by 17 percent. Virgin Holidays, who used to have three different customer communications programs, centralized everything with one system—Adobe Campaign. By doing so, their skilled marketers were able to spend less time wrangling data and more time using insights to design great end-to-end experiences for their customers. The results? A 33 percent increase in revenue, a 66 percent increase in awareness, and a 50 percent increase in retail appointments. These successes aren't lucky. They are the result of charting an intentional course to ensure staying the course and meeting goals. You can do the same.

Adobe can help.

With the cross-channel marketing capabilities in Adobe Campaign, you can design, orchestrate, deliver, and measure personalized campaigns everywhere your customers go—across screens and devices and through online and offline channels. Whether you partner with us directly for implementation, coaching, and strategic guidance, or turn to someone in our global partner network, you can align your organization with cross-channel marketing technology in a way that helps you reach your ultimate goal of becoming a customer experience business.

Learn more

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