



# Making the cross-channel *commitment.*

How to know your organisation  
is ready to say "we do."





**“If all you’ve thought about is the wedding and not the marriage, then you might need to think again.”**

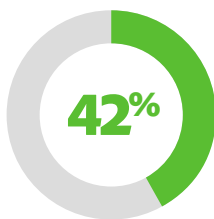
***Renee Willis***

*Author of 101 Most Important Things to Know Before You Get Married*

**A**s humans, we sometimes make commitments we're not ready to keep. We get wrapped up in the ideal without thinking about the reality. When it comes to making big technology investments, such as a cross-channel marketing solution, the same holds true. Many organisations take the plunge without thinking through what it will really take to make the commitment succeed. In fact, without organisational alignment and the right preparations in place, most organisations find that they struggle to achieve their desired outcomes.

But doing nothing isn't an option either. In an increasingly digital world, customers expect seamless, cross-channel touchpoints. They expect you to be where they are, when they are there, with the right content for the moment. If you don't deliver, your competitors will. And the reality is that to achieve the kind of cross-channel experience your customers demand, especially at scale, technology must play a leading role.

So the answer isn't to avoid marrying your organisation to a cross-channel marketing technology, but to make sure that you're ready for the commitment. Before your organisation says "we do," here's a look at three critical ways your organisation should prepare.



*42% of marketers say improving the cross-channel customer experience is being prioritised in the next 12 months.*

*Source: Forrester*



## Realise commitment isn't a *one-way street*.

**N**o relationship can last when only one person is committed. Similarly, no cross-channel technology investment can reach its potential when only one department is committed to its success. To achieve your cross-channel goals, you will need an organisation-wide commitment—with every individual understanding the role they play in supporting the customer experience.

This means that buy-in from executives isn't enough. Team engagement is equally important. Getting full organisational support also involves



minimising silos. So, make sure all the necessary, responsible, and affected teams of people are engaged in a collaborative process, including departments like customer service, operations, research and design, communications, and IT.

Another critical aspect of getting buy-in is ensuring that the technology you want to invest in aligns with your organisations' goals. In an Adobe Summit session, Neal Zamore, SVP of global digital customer experience at Avis, recalls that when he first started at Avis, they were trying to get funding for a "global platform." Five times it went for funding—and five times it failed. But when he took another approach—quantifying how the new platform would help the organisation reach its goal of more revenue through more conversions—he was able to get the support he needed on the first try.

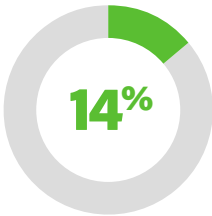
Finally, to get organisational support, you must have a compelling business need for the technology. For example, Bruce Swann, a senior product marketing manager at Adobe, notes one travel and hospitality company's example. They had committed to delivering a better customer experience, and they started by defining how the marketing technology they were purchasing would accomplish the following:

- **Increase customer awareness** of new areas of their parks and hotels
- **Increase customer utilisation** of online processes that are faster and easier for customers
- **Reduce the amount of calls** to their call center with questions linked to their campaigns

**“Marketing is no longer a discrete entity.”**

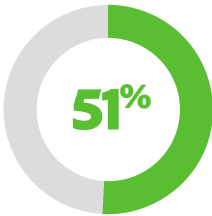
*Source: Harvard Business Review*

These objectives were aligned with the company mission to create a customer-centric experience. They also helped define the exact business need for cross-channel technology. Your objectives may be different, but make sure you know what they are.



*Only 14% of companies say they are currently running coordinated marketing campaigns across all channels.*

*Source: Econsultancy*



*51% of marketers can't react to new channels, devices, trends, or competitors using their current tech.*

*Source: Digital Doughnut and Episerver*



## Build a strong *foundation*.

**M**arriages are most successful when they're built on a strong foundation of mutual understanding and trust. Similarly, your transformation to an experience-led business that delivers effective cross-channel content will do best when there is a strong tactical foundation within the organisation to support the cultural changes necessary. Cathy McKnight, an industry analyst and partner with the Digital Clarity Group, recommends the following:

## **1. Set goals for acquiring campaign automation technology.**

Understand where your business is going and how your marketing teams' efforts can help get the organisation there. Work backwards from large to small—initiatives to strategy to tactics to individual pieces of content.

TIP:

**Make sure to gather input on needs and goals from across the organisation and then set well-defined, measurable goals.**

## **2. Understand your audiences.**

Define your audiences so you can create relevant and targeted strategies. Use your marketing systems data to hone audience segmentation, by demographics and behaviour, and develop campaign and content strategies for each audience you wish to target.

TIP:

**Look beyond internal data and plan to integrate all available, relevant data from external sources to better define and understand your audiences.**

### **3. Secure budget for beyond the purchase.**

There should be enough budget not just for the hardware or software purchase, but for implementation, ongoing maintenance, training, upgrades, agency or consulting services, and cost of the disruption.

TIP:

**Map out the costs of each of these areas and make sure you include them upfront when asking for budget for your software budget.**

### **4. Map your campaign and related processes.**

You can't automate processes you don't understand or that don't exist. Start by identifying what is working, needs revising, or is missing.

TIP:

**Consider internal and external resources involved as well as existing processes and workflows.**

At Avis, Neal Zamore and his team tackled these types of issues by focusing on the deliverable, not the delivery date. Zamore emphasises that it's more important to get it right, including identifying the right processes and workflows and training. For Avis, bringing in a design agency, an SEO agency, and IT to help made a big difference. "We didn't incur the dip we normally see with new sites," says Zamore.



# Six ways to tell if you're ready for a cross-channel commitment.

How do you know if your organisation is ready to say "we do"?

See how many of these statements you agree with:

- ▶ There is a compelling business need for improved technology to support our customer experience goals.
- ▶ There is clarity and commitment to obtain the necessary funding, including implementation and ongoing maintenance of the solution (training, upgrades, etc.).
- ▶ There is engaged, acknowledged and involved leadership sponsorship in purchasing a cross-channel solution.
- ▶ You have a strategy for robust audience segmentation.
- ▶ You have clear content creation and management workflow processes.
- ▶ The project has a clearly articulated, communicated, and understood value proposition.

# Scoring:

## 4–6:

**Congrats!** Your organisation is ready to take its cross-channel vows. Read “Charting a course for an exceptional customer experience” to learn what the next steps are for a successful implementation.

## 2–4:

**You’re almost there.** Just spend a little more time getting your ducks in a row before you take the plunge.

## 0–2:

**Sorry,** your organisation still has some work to do before you’re ready to focus on the customer experience with a cross-channel solution.

# Find your perfect *match*.



**T**he final step on the path to organisational readiness for a cross-channel marketing solution is to find the right technology for your organisation's goals and mission—or in other words, your technology soulmate.

To find the perfect match, you'll need to consider the following:

- **What systems and capabilities are most important?**

Mobile, content management, data management, segmentation—which of these types of capabilities do you see as currently lacking in your organisation and which ones are most critical to delivering successful cross-channel experiences? Where can you optimise your workflow and what technology can best support these types of optimisation? How will the

technology integrate with other solutions or is there one technology that provides a comprehensive solution? Try to answer all of these types of questions as you look for the best fit for your organisation.

- **Which channels do you want to focus on now or in the future?**

You may be looking for an email marketing tool today, but you should also be thinking about what tomorrow might hold. In a year's time, will you be looking to expand to several channels, such as mobile or social? Start by understanding your audience and knowing which channels they are on and which ones are best for which types of messages. Look also at where your competitors are. If all your competitors are on a channel and you're not, it's a strong indication that you might want to be there too. Finally, make sure you select a tool that doesn't just fit you today, but can grow with you tomorrow.

- **What deployment considerations, such as data, compliance, or legal requirements, are important for your organisation?**

If you are in a highly regulated industry, such as government, finance, or healthcare, these types of requirements will play a larger role in determining what technology has the compliance certifications to support your needs.

- **What are your customer journeys like and what do you need to support these?**

Customer journeys are rarely linear, but they are extremely important. According to Econsultancy, top-performing companies are 50 percent more likely to have well-defined user journeys. To deliver a seamless experience, you need to know where your customers are and where they will be next so that you can allow them to pick up with you right where they left off without missing a beat.

- **What does your brand stand for and how can technology help support the brand?**

This isn't just about the fonts, visual style, or RGB colours you'll use. You need to determine your brand voice as well and how the technology you use can help support and protect it throughout the creation and delivery process. If the people creating the content, apps, or websites don't understand the emotion they are supposed to evoke, the results will be inconsistent and can have a huge impact on the customer experience.

- **What are the KPIs you want to hit?**

The KPIs you choose to measure should link back to your organisational goals and mission. Additionally, make sure your KPIs are cross-team so that you're aligning your goals throughout the organisation. Be open to learning from your KPIs and letting them drive your behaviour for what to do next.

Travelocity found their perfect technology match by starting with the areas where they needed the most help. They knew that they had a relatively small team, that they had challenges with their internal IT department—a landing page request could take six to eight months—and that their SEO team was having trouble getting timely data so they could bid on search engines. This meant that the ability to automate processes, create and deliver content without coding, and gather and apply data were all critical capabilities they needed in a cross-channel technology.



The cross-channel solution they chose allowed their team to make updates without having to put in an IT request. Also, because they understood their customers' journeys and knew that customers often bounced from looking for best airfares to looking for hotels deals, they were able to create a landing page known as "My Trips" that made this experience better. With the use of machine learning, custom APIs, and automation capabilities, [Travelocity's small team](#) can now make updates once that apply across all channels. They are also able to serve customers personalised content, such as hotel or airfare deals, using the data from past shopping behaviour. Finally, having the right cross-channel technology has allowed their SEO team to quickly get the data they need to bid on search engines and is helping Travelocity meet their KPI for higher conversion rates.



**“It’s not just email anymore. We have push, SMS, we have social—but really at the end of the day, it’s about just innovating for the sake of talking to customers in the best way possible.”**

**Shane Lewis**

Director of Email Marketing, Travelocity

# Build lasting cross-channel love with your *customers*.

**E**veryone wants to make commitments and partnerships that succeed. But it can be hard to change who you are as an organisation. Moving from being product-focused to customer-focused, eliminating silos, and increasing cross-department collaboration to deliver a better customer experience will take some internal soul-searching and determination. However, if you don't take the time to ready your organisation or make the investment to train and hire the right talent, it's almost inevitable that old habits will take over and you won't realise a fulfilling relationship with your new cross-channel marketing technology.

But if you lay the groundwork first by building organisational support, creating a tactical foundation to support the change, and assessing what characteristics you need from the technology to help your organisation succeed, the ending of your story can look different from most—it can be one where you're ready for the commitment. And, by saying "we do," you're able to build deeper and more lasting and loyal relationships with your customers. Because you're there when they want you with exactly what they desire.

# Is your organisation ready to take the cross-channel plunge?

Check out “Charting a course for an exceptional customer experience” to learn how to design the right roles, teams, and incentives to be successful using a cross-channel marketing solution.

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