



# Marketing Automation Bootcamp

ICMA, Athens, Oct 22 2014



# Agenda

1	About DemandGen Europe
2	Introduction to Marketing Automation
3	Approach to Marketing Automation in 4 Steps
4	The Customer Lifecycle
5	Social Relationship Management
6	Campaign Monitoring and optimization
7	Platform Overview
8	Use Cases

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## About DemandGen Europe

# About DemandGen

## Location



- Headquarter DemandGen Europe: Munich, Germany
- Offices in Eisenstadt (AT), London (UK), Singapore (SG), Melbourne (AU)
- Headquarter DemandGen International: San Francisco (US)

## Facts

- Founded in 2003
- 80+ Employees
- Over 200 clients

DemandGen is a global team of lead management and marketing automation experts, with centers of excellence across Europe, Asia and North America. DemandGen has helped hundreds of clients establishing **Integrated Lead Management** and **Customer Lifecycle Management** frameworks using **Inbound Marketing** and **Marketing Automation**.

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## Introduction to Marketing Automation

# Your Objectives

## — Increase Customer Loyalty

- Cross-selling
- Transform customers into ambassadors
- Generate brand priority on retail

## — Engage with Online Visitors

- Generate Opt-Ins
- Increase Conversion
- Engage & Interact
- Cross-Channel communication



# Do you know your Online Visitors?

## Explicit

- Demographic
- Declarative
- Transactional



## Implicit

- ✓ Engagement
- ✓ Lifestyle
- ✓ Brand Loyalty

# What if...



... you knew the favorite get-away of your online visitors?

... you knew the favorite theatre of your female subscribers?

... you knew which content attracted them most during their last visit?

... you could offer a special in real-time because you had that information?



# The Art of Conversion

- In order to convert from one stage to another you need to **progressively profile** your audience.
- Using profile information to nurture your audience leads to **loyalty** and **trust**.

The diagram illustrates a progressive lead form strategy with four stages:

- 1. Basic Lead Form:** Fields for First Name, Last Name, Email, and Company. A red "GET OFFER" button is at the bottom.
- 2. Returning Leads - Pre-Populate:** Fields for First Name (Tim), Last Name (Smith), Email (tm.smith@novaco.com), and Company (Novaco). A red "GET OFFER" button is at the bottom.
- 3. Returning Leads - Pre-Populate - Gather More:** Fields for First Name (Tim), Last Name (Smith), Email (tm.smith@novaco.com), Company (Novaco), Job Title, and Phone. A red "GET OFFER" button is at the bottom.
- 4. Returning leads - Personalize - Pre-Populate - Progressively Gather More:** A personalized welcome message "Welcome back Tim Smith. Please complete the form to receive the offer..." is shown. Fields for Email (tm.smith@novaco.com), Industry (Please Choose), What is your budget (Please Choose), and When do you need this solution (Please Choose) are present. A red "GET OFFER" button is at the bottom.

# Freemium Models

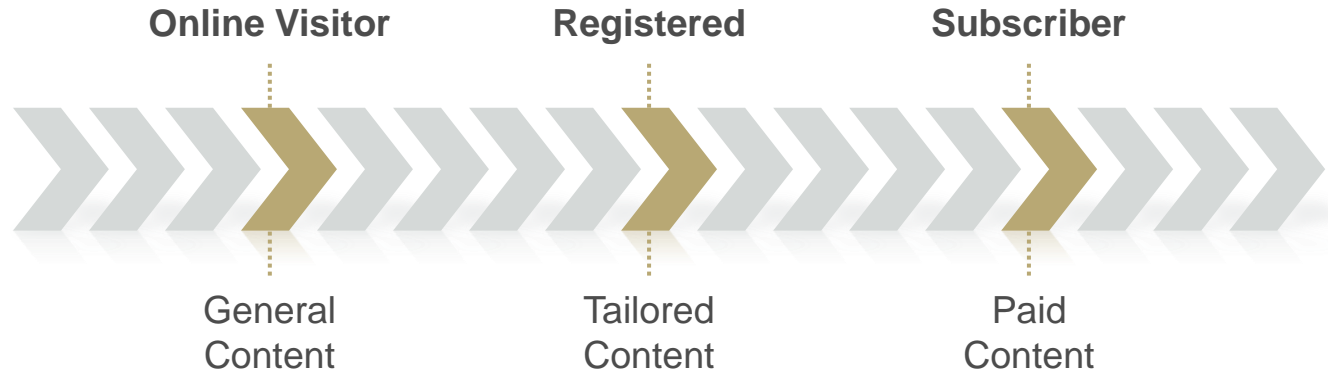
What media companies can learn from the software industry



# The Reader's Journey (I)

## From Visitors to Subscribers

— Understand your reader — Tailor your content — Built relationship and trust



# The Reader's Journey (II)

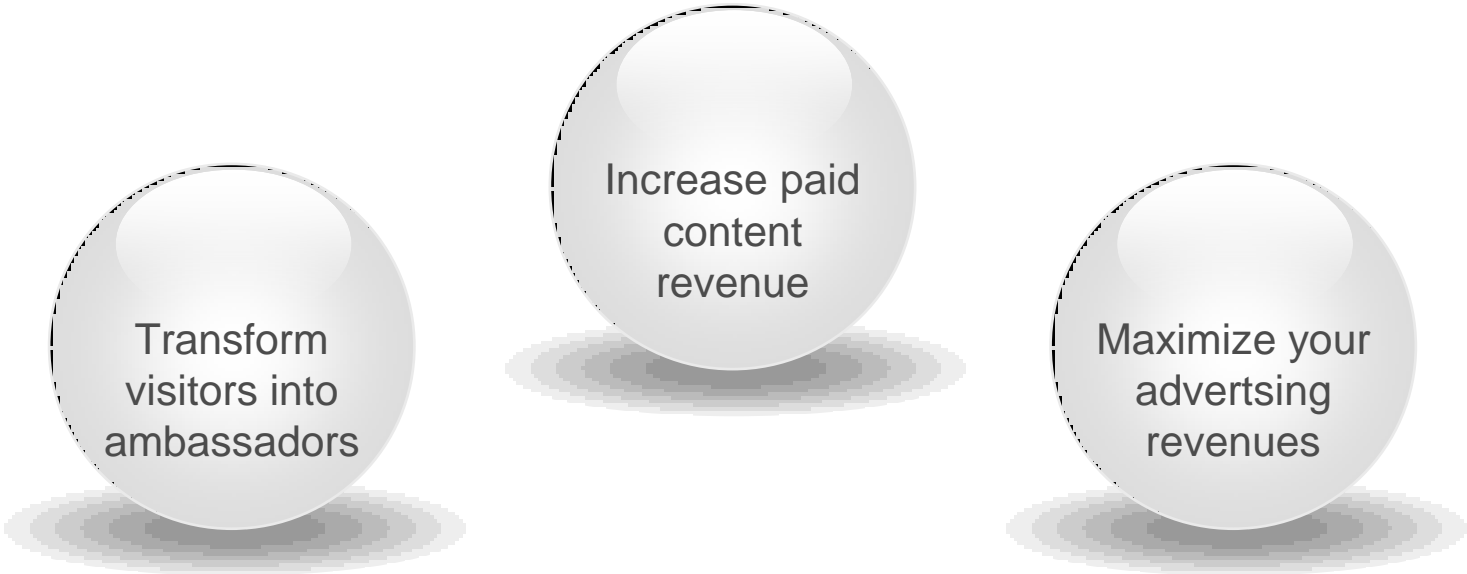
## From Readers to Ambassadors

— Increased Loyalty — More revenues — Ambassadors to drive more Visitors



# Media Industry Objectives

Marketing Automation is designed to :

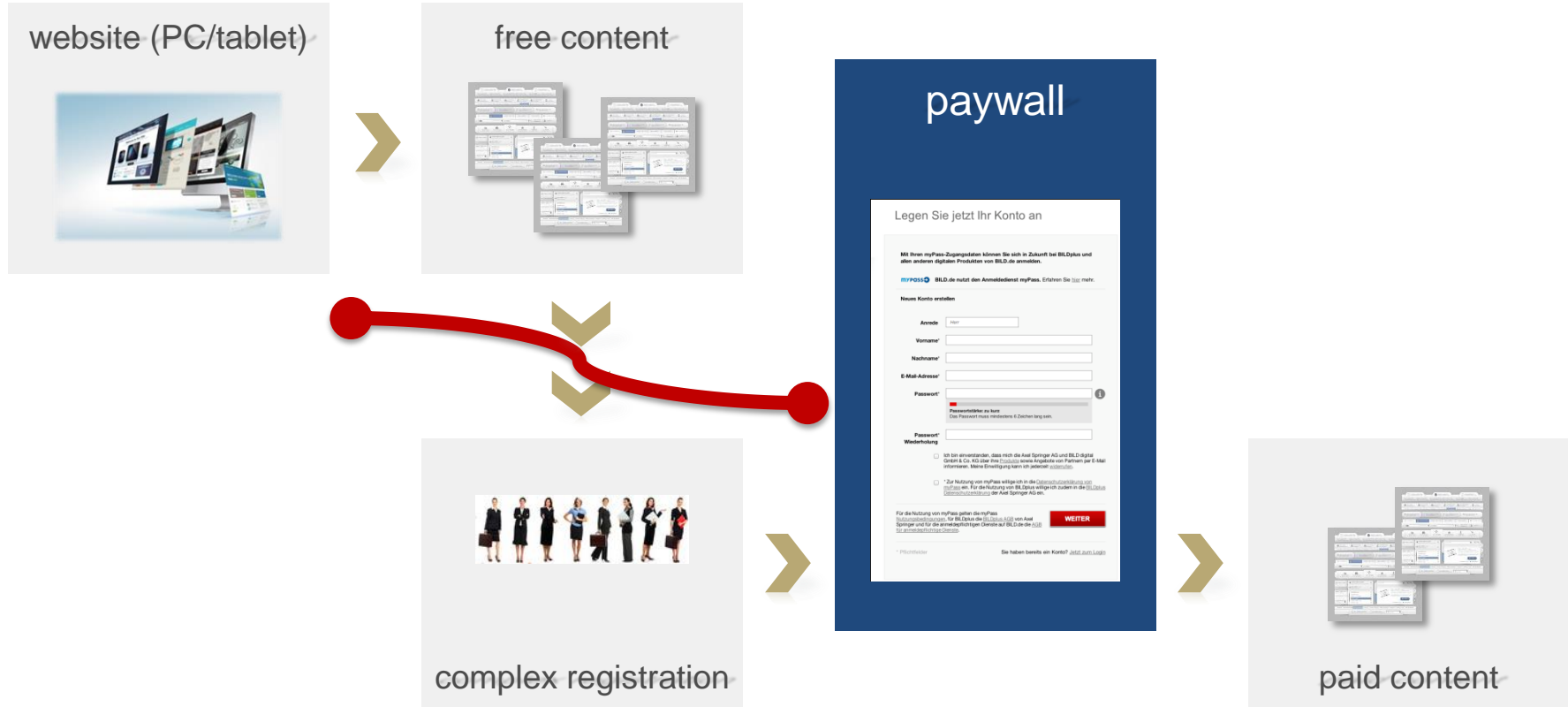


Transform  
visitors into  
ambassadors

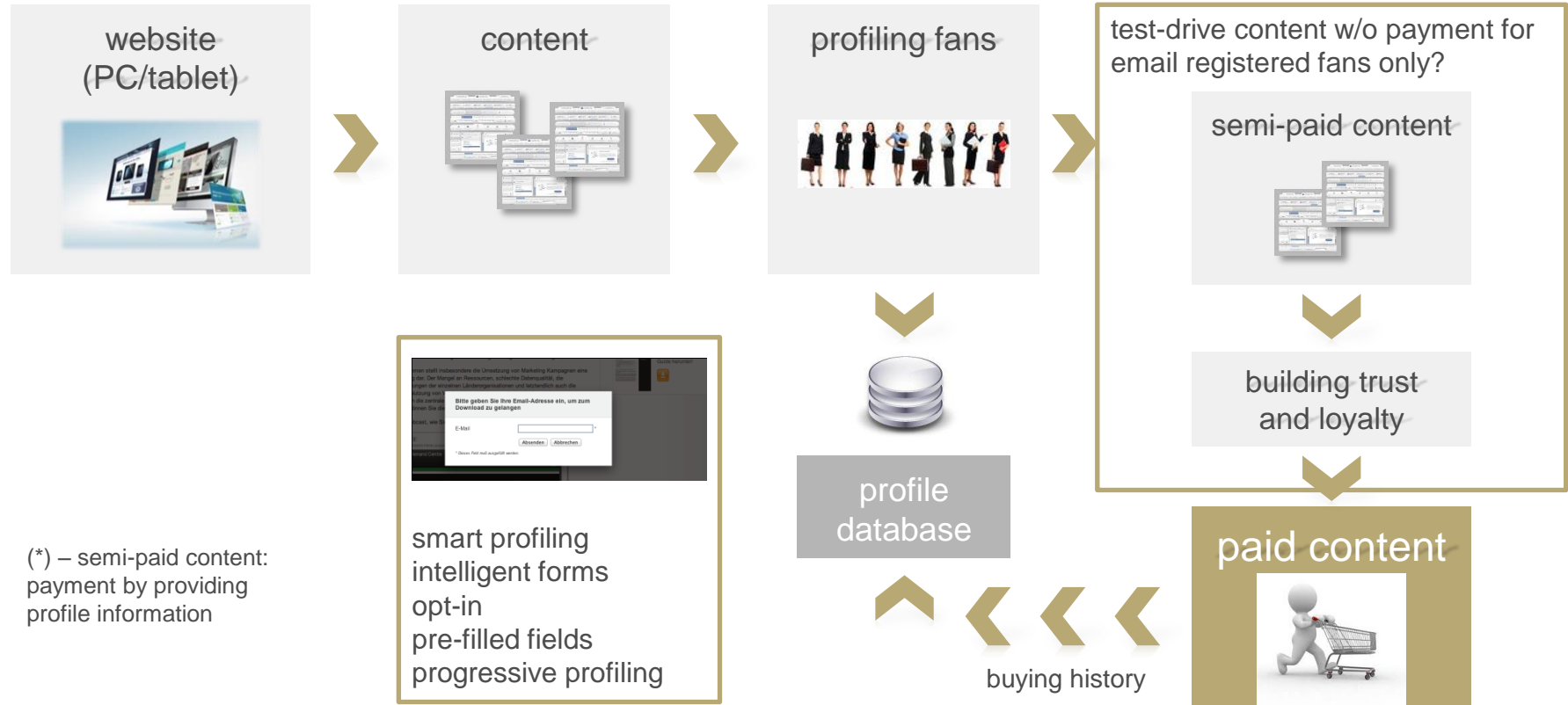
Increase paid  
content  
revenue

Maximize your  
advertising  
revenues

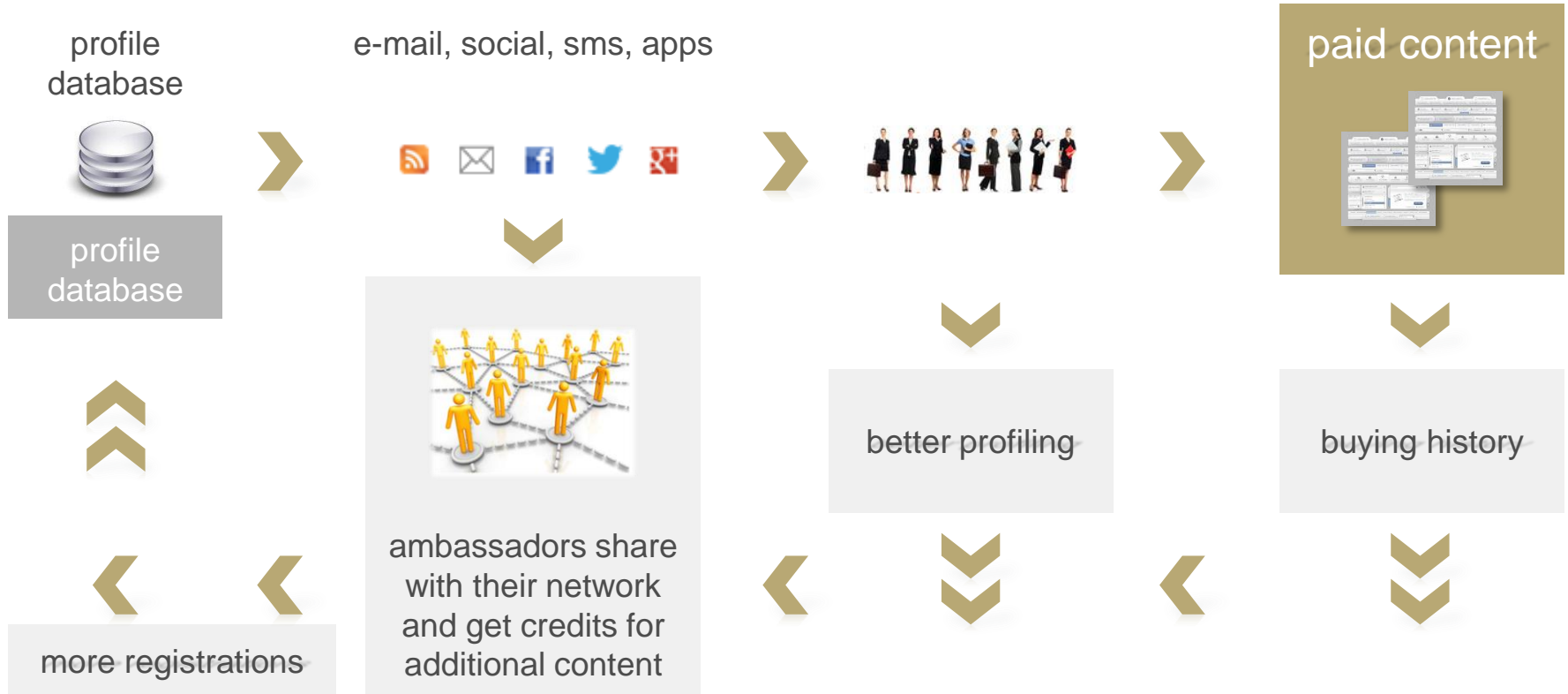
# Today: Paid Content Distribution Model



# Tomorrow: Turning Fans into Buyers by Semi-Paid (\*) Content



# Future: Turning Buyers into Ambassadors





# Segmentation



# Golden Questions

## What do you need to know about your potential buyer?

**Do you own a NESCAFÉ® DOLCE GUSTO® machine?**

☒ Yes, I'm the proud owner of a NESCAFÉ® DOLCE GUSTO® machine & have my unique machine code

☐ I own a NESCAFÉ® DOLCE GUSTO® machine & will update my code later

☐ No, I haven't got a NESCAFÉ® DOLCE GUSTO® machine

Register your machine here using the unique code on the leaflet that came with your machine. In return, you'll receive enough Bonus Points for a free box of coffee.

**Enter your unique machine code**

Machine model\*

☐ NESCAFÉ® DOLCE GUSTO® machine

☐ NESCAFÉ® DOLCE GUSTO® machine

☐ NESCAFÉ® DOLCE GUSTO® machine

Date of purchase\*

month  year

\*Mandatory fields - please fill in.

**How did you come to own me?**

☐ I bought you myself

☐ A present that I had asked for

☐ A surprise present from someone who thought I would like you

**Where did you buy me? I should know but it is difficult to tell when you are in a box**

**What made you decide to buy your Nescafe Dolce Gusto?**

Choose one of the following.

☐ I saw a demonstration

☐ I did some online research

☐ A recommendation from a friend

☐ A friend introduced me to the great taste of coffee

☐ I saw an advertisement

☐ There was a special price promotion

☐ I fell head over heels with it's great taste

**Where did you buy your Nescafe Dolce Gusto?**

Please choose

**Who do you live with? Please choose**

☐ I live on my own

☐ I live with my friends

☐ I live with my partner

☐ I live with my children

☐ I live with my partner and our children

**We don't like to pry, but if you could tell us your age we'd be very grateful.**

Please choose

**What do you like best about coffee? Please choose**

☐ It's convenient and easy to make and it kick starts my day

☐ I drink it everyday because I love the taste

☐ I like to treat myself

**On average, how many hot drinks do you have a day?**

☐ Up to 3 a day

☐ 4-5 a day

☐ 5+ a day

**And how many of those drinks do you make with your new coffee-wizard?**

☐ I probably won't have Nescafe Dolce Gusto everyday

☐ 1-2 a day

☐ 3+ a day

**On average, when do you drink:**

	Tea more often	Coffee more often
First drink of the day	<input type="radio"/>	<input type="radio"/>
Breakfast	<input type="radio"/>	<input type="radio"/>
Mid Morning	<input type="radio"/>	<input type="radio"/>
With Lunch	<input type="radio"/>	<input type="radio"/>
After Lunch	<input type="radio"/>	<input type="radio"/>
Afternoon	<input type="radio"/>	<input type="radio"/>
Early Evening	<input type="radio"/>	<input type="radio"/>
After evening meal	<input type="radio"/>	<input type="radio"/>
Before Bed	<input type="radio"/>	<input type="radio"/>

**NEXT**

[More about our privacy policy](#)

# Visitor Qualification

## Explicit

### Declarative

- Reader Survey

### Transactional

- Data from direct transaction with the brand (content)

## Implicit

### Digital Body Language

- Social Listening
- Social Sharing
- Web/Email Tracking

# More Segmentation Criteria

## Understand the ROI potential per customer

### — Lifestyle

- Is the consumer a low, medium or high potential user?

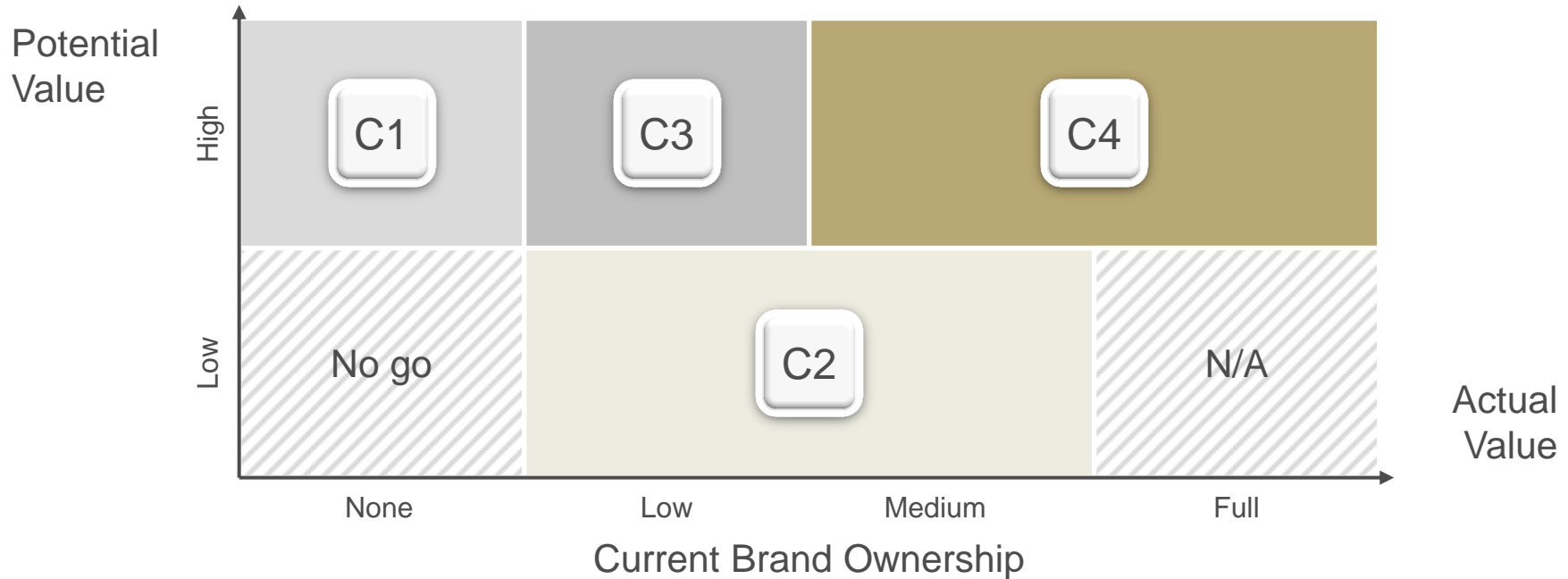
### — Lifecycle

- Is the consumer in a cold, warm or hot phase of the purchase cycle ?

### — Brand ownership

- Does the consumer own any of your product families?
- Does the consumer show affinity for the brand positioning ?

# Visitor Segmentation



C1 High potential readers > Monitor activity

C3 High potential readers > Increase range usage

C2 Low potential readers > Generate trial / Recruit to the brand

C4 High value readers > Maintain loyalty

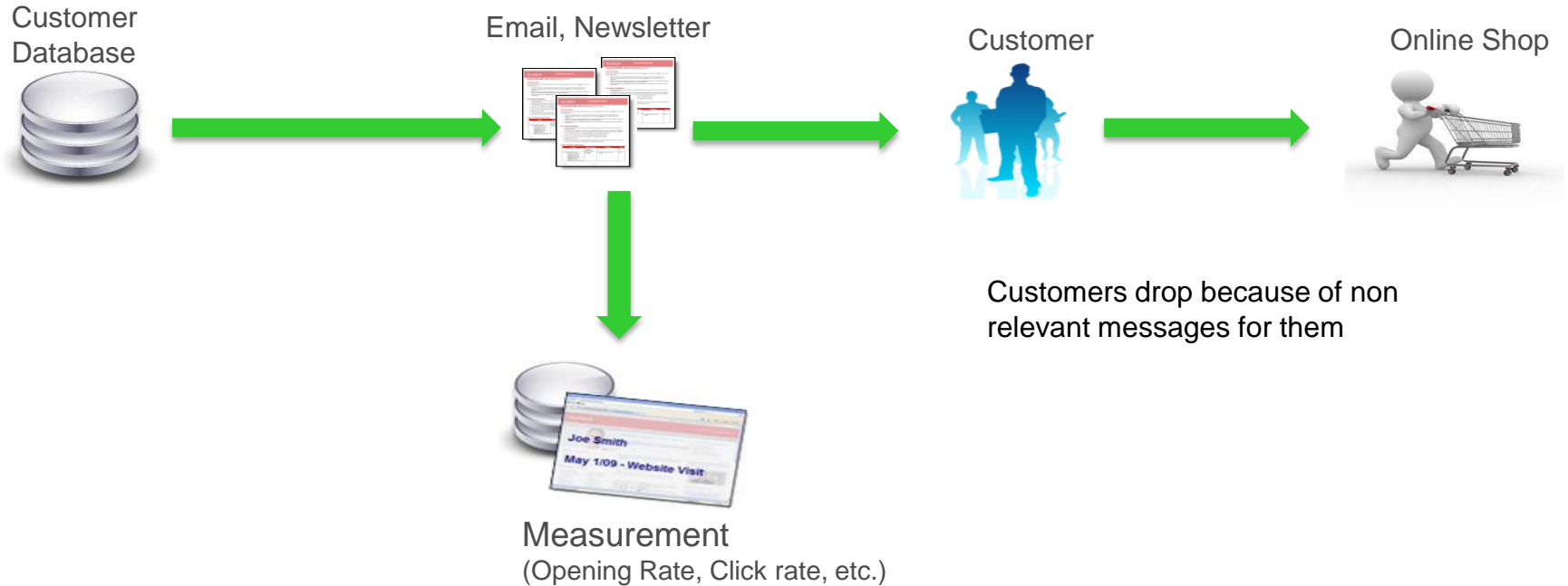
# Visitor Clustering



# Communication



# Email in the past – push communication





# But everyone is different!

**Demographics**

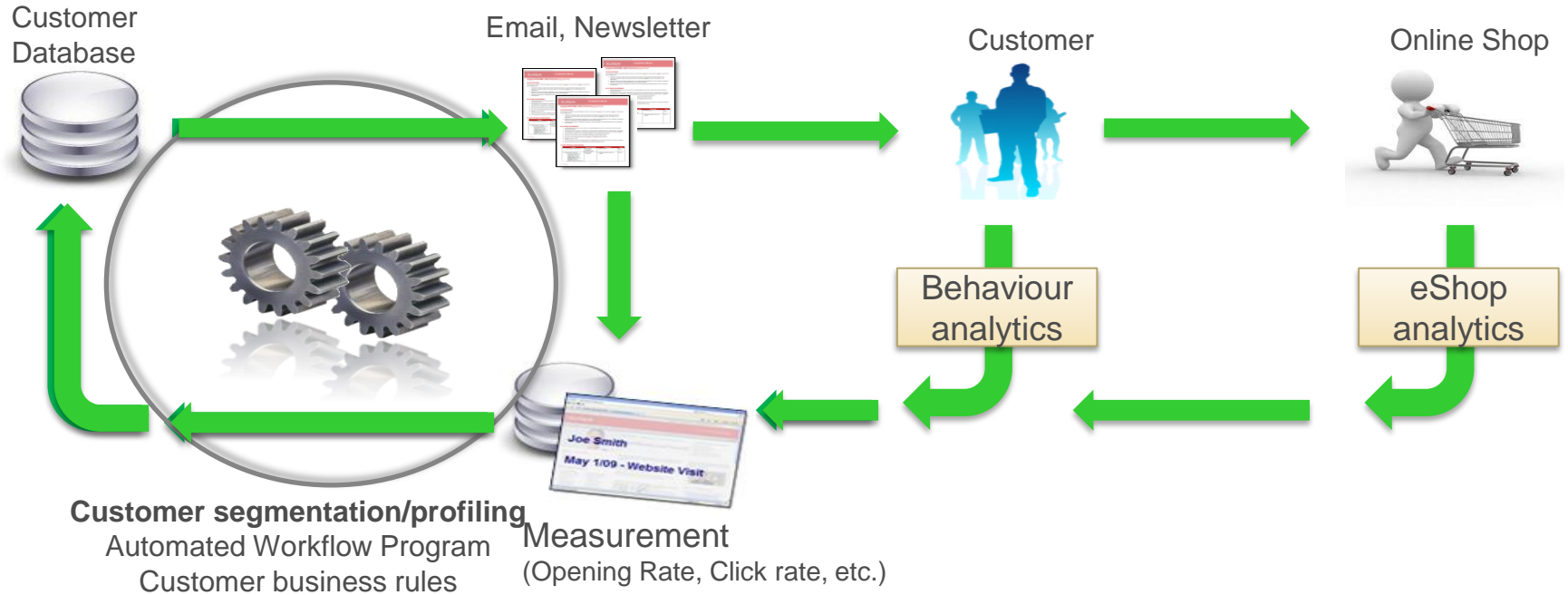
**Maturity**

**Behaviour**

**Needs**

**Brand interaction**

# The 1:1 Closed-Loop Automation

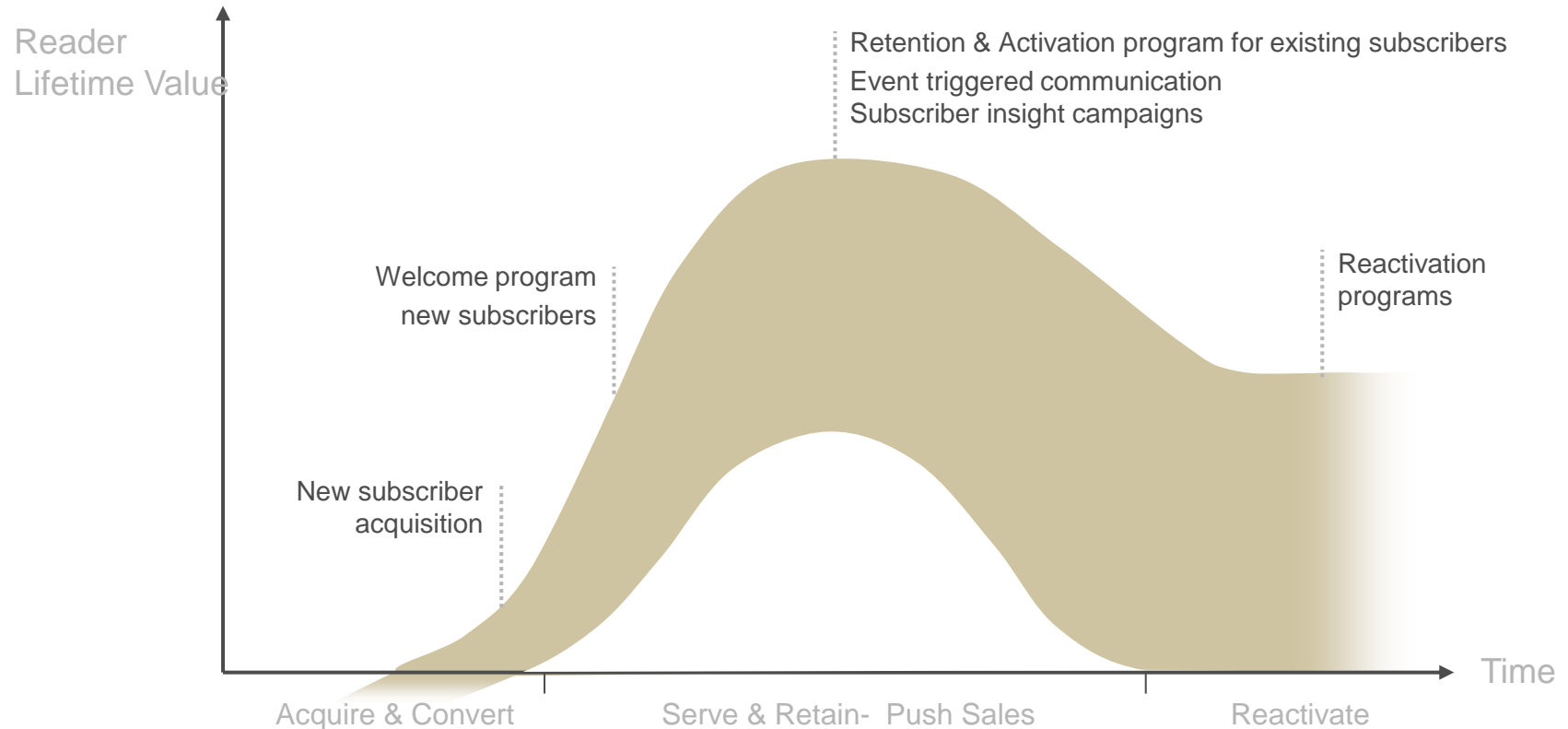


# The Golden Rule for Marketing Automation

**Engage your audience  
with relevant content on the right channel and at the right time**



# Subscriber Relationship Management based on the Lifecycle

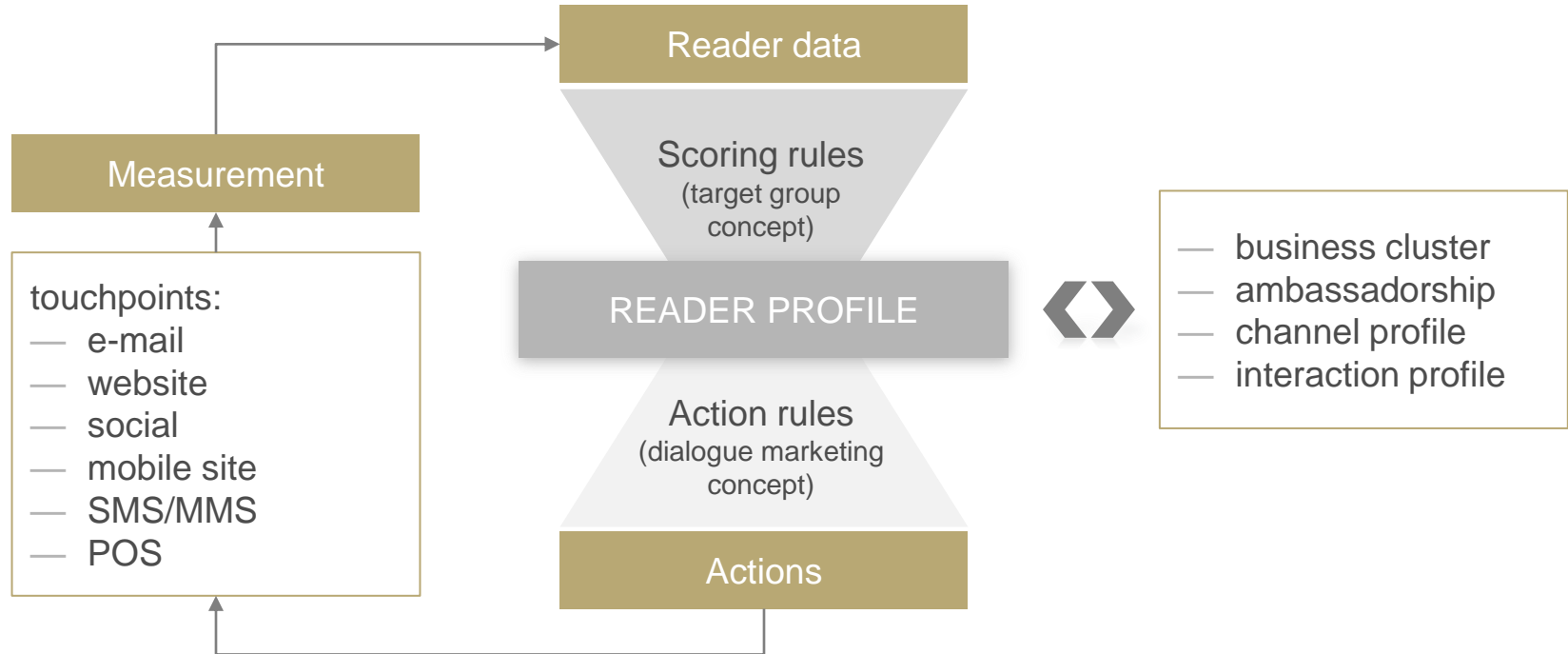


# Progressive Profiling



# Ongoing Qualification Model

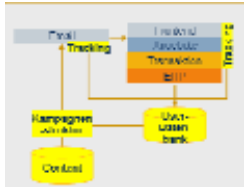
Dynamic system based on effective results per Reader



# System Optimization

## Technique

### IT infrastructure



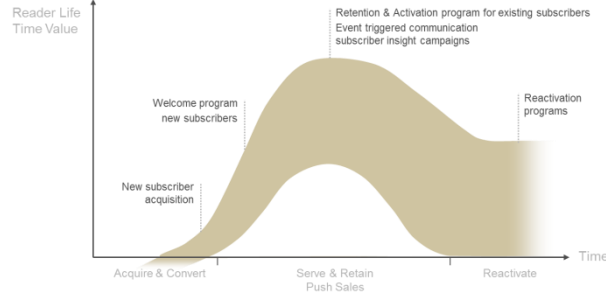
campaign structure

reader data

content

tracking

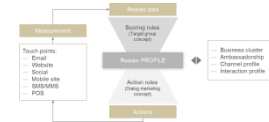
## CRM Optimization



business case



## Data Management



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## Approach to Marketing Automation in 4 steps



# Your approach in 4 steps (1/4)

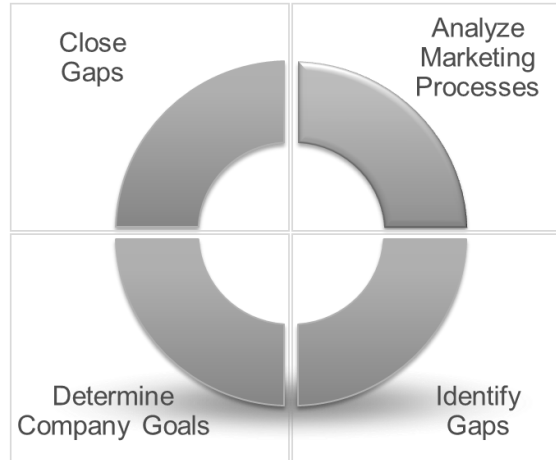
## Step 1: Marketing process analysis

Step 1

Step 2

Step 3

Step 4



As a first step your current marketing processes - including your existing client data - will be analyzed. Moreover, we will define your quantitative and qualitative marketing goals and identify process gaps that need to be closed.

# Your approach in 4 steps (2/4)

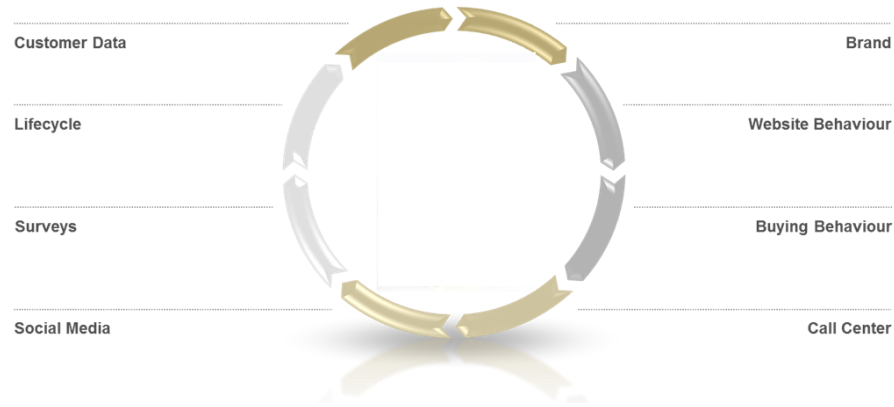
Step 1

**Step 2**

Step 3

Step 4

## Step 2: Data Segmentation & Profiling



Then, DemandGen will perform a data segmentation. On one hand in order to segment according to "lifestyle", "lifecycle" and "brand ownership", and on the other hand in order to assign the digital body language and buying behaviour. Only that facilitates relevant target group segmentation which serves as the basis for Customer Lifecycle Management. At the end of this phase, consumer segments will be defined

# Your approach in 4 steps (3/4)

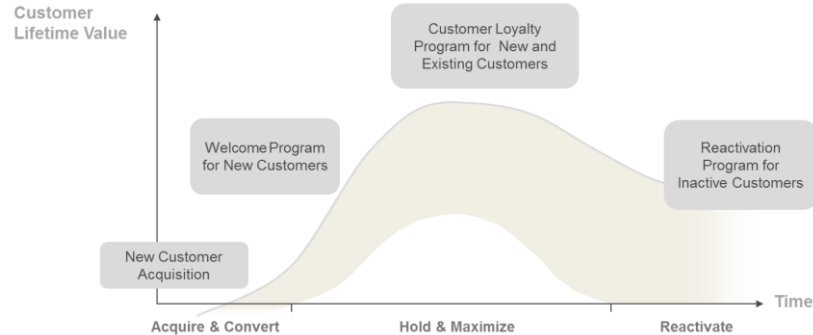
Step 1

Step 2

**Step 3**

Step 4

## Step 3: Customer Lifecycle



Drawing the Customer Journey and lifecycle stages for each cluster will allow to define relevant activities on how to accompany the consumer from one step to the next in order to maximise his value.

As an outcome, an activity matrix will be defined per stage and profile, incl. for instance : automated programs, loyalty concept, surveys, events, campaigns, etc.

# Your approach in 4 steps (4/4)

Step 1

Step 2

Step 3

Step 4

## Step 4: Pilot campaigns and KPIs

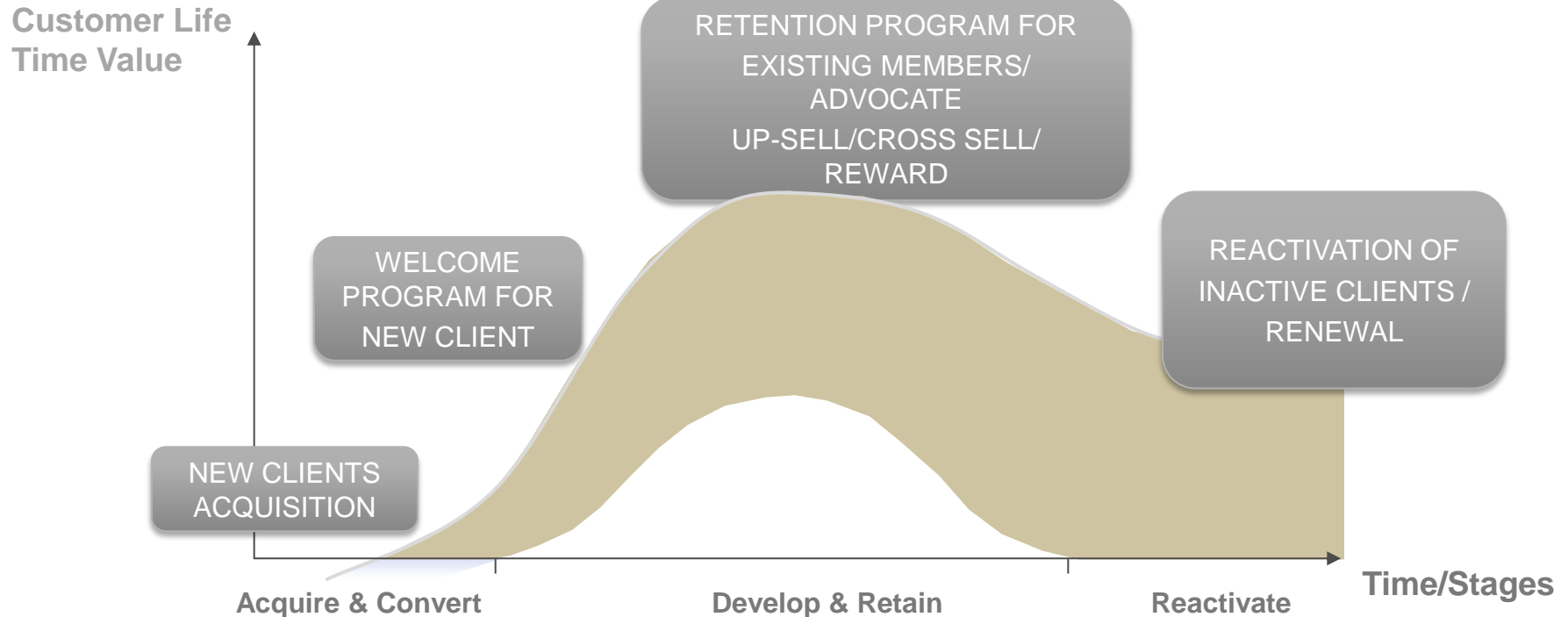


A pilot campaign will be run to kick off the CRM strategy, in which tests will be done (A/B Testing, Clusters validation, etc). The pilot campaign will serve as a proof of concept and basis to optimize the whole plan. For each program, KPIs will be defined and relevant reportings will be setup.

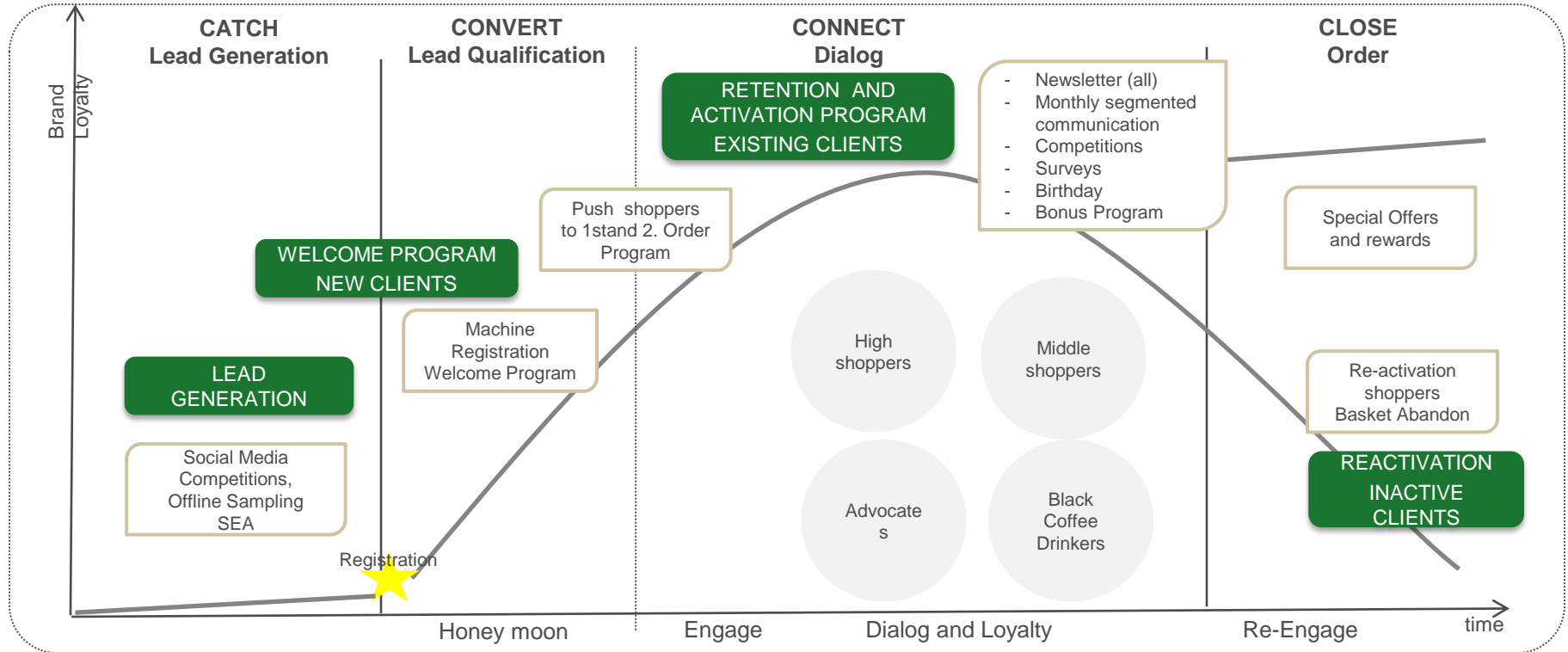
4

## The Customer Lifecycle

# Overview of a typical Lifecycle

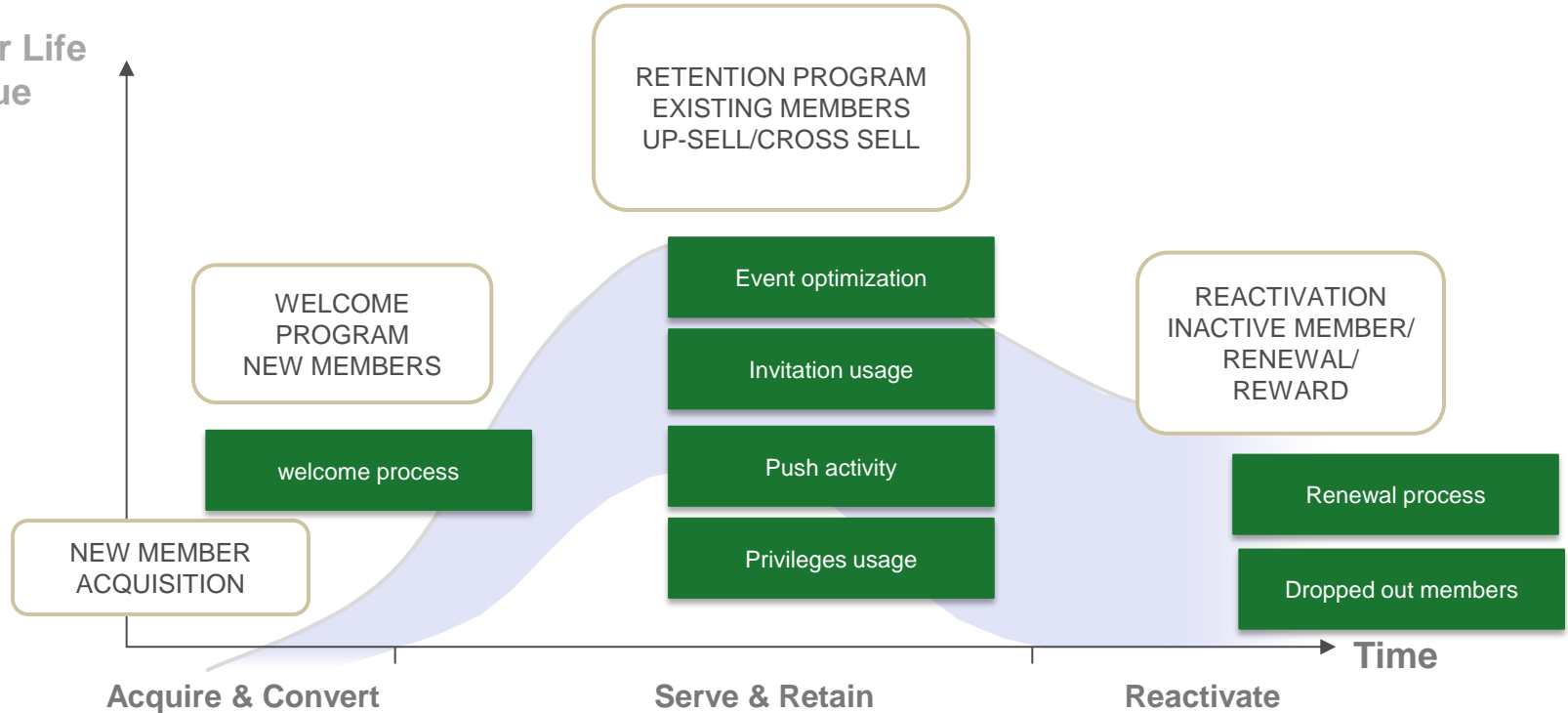


# Customer Lifecycle – Example 1 - eCommerce



# Customer Lifecycle – Example 2 – Community

Customer Life  
Time Value





# Scoring: an Innovative way Identify your potential ambassadors (1/2)

## WHAT IS SCORING?

Thanks to an intelligent system, automatically rank your contacts by giving them points based on:

- Their fit to the brand (the closer they are to your ideal consumer, the more points they will get)
- Their interest in the brand (Based on their activity on the website, blogs, social media, emailings, event participations, etc)



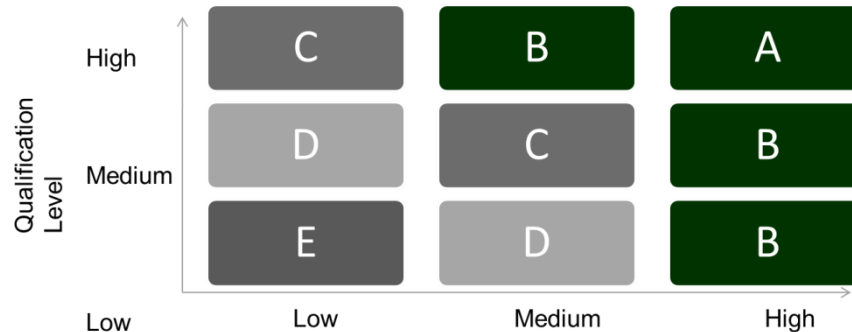
The definition of the points are defined during a workshop and implemented in the tool. Based on the number of points they get in each area, they will be given a score (calculated every day)

# Scoring : An Innovative way Identify your potential ambassadors (2/2)

## WHAT IS SCORING?

Depending on where contacts are in the matrix, define strategy for each of the groups, eg:

- Group A – your ambassadors : create specific campaigns for them to communicate on your brand
- Group B/C – try to qualify them and activate them further
- Etc



The monitoring of the scoring model will also allow you to monitor the health and activity of your database

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## Social Relationship Management

# Social Relationship Management

## All key areas of Social Relationship Management

Listen	Create	Interact	Analyse
<ul style="list-style-type: none"><li>• Browse and consolidate <b>discussions</b> and track <b>sentiment</b></li><li>• <b>Brand analysis:</b> What is said about the brand (positive/Negative) / Identification of innovation potentials</li><li>• <b>Competition analysis:</b> what do competitor share on social networks</li></ul>	<ul style="list-style-type: none"><li>• <b>Create and distribute content</b> simultaneously on your channels: Facebook Twitter/G+</li><li>• <b>Plan and execute campaigns</b> in a tool incl. plan, responsibilities, etc</li></ul>	<ul style="list-style-type: none"><li>• <b>Monitor</b> your database activity and uncover markets trends</li><li>• <b>Generate new leads</b></li><li>• <b>Answer</b> questions and react quickly to negative comments</li><li>• <b>Assign</b> other service departments → Social Media as consumer service and sales channel</li></ul>	<ul style="list-style-type: none"><li>• <b>KPI Dashboards:</b> likes/dislikes, fan base growth, interaction, shares, etc</li><li>• <b>Single Campaign metrics</b></li><li>• <b>Campaign success</b> based on metrics and pre-defined goals</li></ul>

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## Campaign Monitoring and Optimization

# Dashboards and Reporting

Marketing Dashboards give every decision maker visibility into the metrics that drive business. Essential for every marketing organization – regardless of size Marketing Dashboards help guide future marketing investments by providing insight into:

The health of  
your  
marketing  
database – is  
it growing?

Top emails  
driving  
inquiries for  
any time  
period

Where  
website  
visitors come  
from and  
referring  
channels

Social  
Media Activity

Campaigns  
driving the  
most revenue

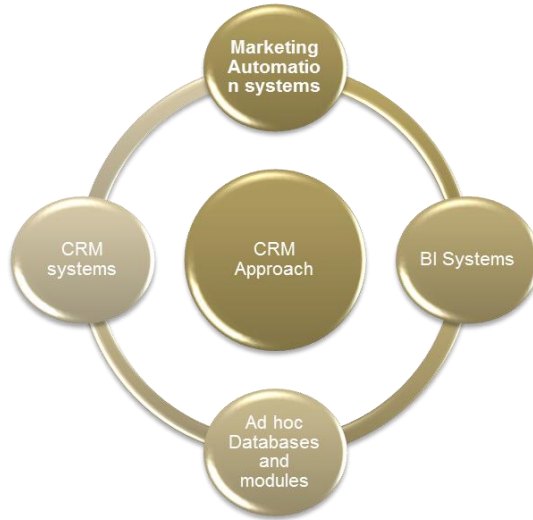
Bounce back  
and visitor  
click through  
rates over any  
time period

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## Platform Overview

# System integration for a successful CRM Strategy

The consolidation of all systems is critical to achieve your goals



Integrated approach where all systems are leveraged individually or integrated with one another to provide value and a seamless experience for the consumer across channels.

The Marketing Automation systems become the central place for the management of the strategy and is enhanced through the integration of other modules

Thanks to BI systems and tools, the CRM strategy can be monitored and its contribution to revenue can be tracked



# Marketing Automation and social relationship management tools



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## Use Cases

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*Thank you!*