

INTENT MARKETING. ROAD TRIP

MAPPING THE
CUSTOMER JOURNEY

INTENT MARKETING ROAD TRIP



Kim Davis
Editor-In-Chief
DMN

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Connecting marketing to customer intent is one of the holy grails of the industry. Intent marketing —marketing that positions a product or service in response to measures of consumer intent — is a strategy leading to that goal.

Intent marketing is an extension of the micro-moment philosophy — the idea that customers have certain questions or thoughts in mind about their needs, prior to a purchase action. A series of micro-moments creates a customer journey. Customers use digital channels (often, multiple digital channels) to get to a product or service that addresses their need.

Understanding these moments is a prerequisite for creating an intent-based customer journey. A retailer who cares about shopping cart activity, for example, can create content that highlights conveniences, like easy in-store returns, free shipping, or other service features responsive to customer needs. On the B2B side, intent data can align sales and marketing teams, and help identify qualified prospects earlier on in the sales cycle.

In this eBook, we're taking a little trip through the customer journey. Each "stop" represents a different stage in the buying cycle – from scoring potential prospects, all the way through to retargeting and retention. We'll be exploring best practices, and how data, AI, and team alignment all play a critical role in intent-based marketing success.

Come along for the ride! ●



SCORING AND EVALUATING PROSPECTS BASED ON INTENT

DMN EDITORIAL TEAM

AI IS MAKING
IT EASIER FOR
MARKETING
TEAMS TO
DISCOVER WHO
IS IN MARKET –
AND WHEN

Scoring prospects started out as a matter of applying rules to data. An informed marketer sets up criteria as to which prospects are more likely to buy. A CRM program crunches the data, applies the rules, and qualified lists appear.

AI changes the game. Now an algorithm can be crafted, and data sets can be tapped. Most importantly, the model can predictively score likelihood to buy.

"Practically no company is good enough at inbound and outbound on its own to be able to find and engage a majority share of the truly active demand in the marketplace," Jon Steinert, CMO, TechTarget, said. "Classic lead gen can't find a lot of the deals out there. Intent marketing, done holistically, combines intent that you can see on your own properties, and in your systems, and augments it with legitimate intent from outside. The companies that are most effective with intent are those who have learned how to activate best on it."

TAKING A DATA-DRIVEN APPROACH

Data is fuel for AI. In Oracle's case, the Oracle Data Cloud is the fuel tank. It has about five billion consumer profiles, and another 800 million B2B profiles. Combine this with first-party data, and that should produce a self-learning scoring system that moves faster than a rules-based system.

"The system launches in a goal-oriented direction," Jack Berkowitz, VP, products and data science at Oracle Adaptive Intelligence, said.

Rules-based scoring can, at best, accommodate 15 to 20 different attributes.

"Anything more complex than that is hard to write or understand," Berkowitz said.



SCORING AND EVALUATING PROSPECTS BASED ON INTENT

“Intent marketing, done holistically, combines intent that you can see on your own properties, and in your systems, and augments it with legitimate intent from outside. The companies that are most effective with intent are those who have learned how to activate best on it”

Taking the data-driven approach allows marketers to analyze hundreds, or thousands, of characteristics – yielding a greater range of options to reach a wider range of prospects.

This approach also opens multiple paths for approaching a prospect. Take one persona: a soccer mom, for example. That same person can also be a prosecuting attorney, or an international traveler, Berkowitz noted.

AI-POWERED LEAD SCORING

SAP Hybris differs by viewing AI-applied scoring as the sum of rules and numbers.

“All scores are based on math, and although the actual values sometimes seem arbitrary (most often 0 to 100 or 0 to 1) they are not. In fact, these numbers are value systems that can be compared across variables, such as customers and time,” Jackie Palmer, global VP strategy and solution management, said.

Predictive scoring works best in conjunction with traditional rules-based scoring. Rules are needed to ensure the scores align back to the components of the overall marketing strategy.

For example, a high score is useless if the person is marked as ‘do not contact’ — that person would have been filtered out if a rule was set to do so. The ideal is to have a combination of predictive and rules-based approaches.

A MIXED-MODEL APPROACH

Adobe takes an agnostic approach. “The score comes in as a data point, like any other data point,” said Jason Hickey, senior product marketing manager at Adobe Target. Trying to make sense of the data can take two routes: simple model and ensemble.

“Simple model is more interpretive, but it can’t model complex processes,” Hickey said. “The trade-off is interpretability. In the simple model, interpretability is done by the human.”



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PERILS OF MODERN AI"**

While AI can pound through the data to produce scores, humans still get to decide what to do with that information.

"Even prior to the use of AI in scoring, once the rules-based or basic predictive scoring was set up, it was often run in a 'lights out' mode with marketers focusing on strategies and content," Palmer said. "Adding AI really won't change the marketer's day-to-day job, but they should be able to do that work with deeper insight because of the technology."

AI scoring allows marketers to drill down to the micro-segment level, but there are limits to how far down you can go, even though you can track individuals, Palmer said.

"We all follow patterns in our daily life, whether professionally or personally, so somewhere out there is a person or a business like us, or closely similar to us," Palmer said. "Based on this logic, a company wanting to market to us would benefit from grouping or segmenting us with some of our peers."

Though AI makes data collection easier, only humans can think about the customer journey holistically.

"The technologies that are really making traction in the data space right now, whether you're talking data for account fit, for contact augmentation, or behavioral data like intent, really seem to be focused around making the data easier to activate around," Steinert said. "The solutions that serve up data do it in a way that applies to very clear, specific and valuable use cases. When vendors make it easier to get value from the data, clients can see success quickly."

BUT HOW MUCH DATA?

Conceivably, AI can produce millions of "segments of one," tailoring a pitch for every person.

You can get to personalization at scale, but right now that often goes no further than a recommendation engine.

"Human judgment will be needed to avoid negative inputs," Berkowitz said. "The industry term for this is 'creepy.'" ●

RESEARCH AND CONSIDERATION

AMY ONORATO, MANAGING EDITOR, DMN

USING INTENT DATA IN B2B MARKETING STRATEGIES



John Steinert
CMO
TechTarget

Strike while the iron is hot. It's a shared sentiment between Sales and Marketing teams. Both organizations are dedicated to figuring out the right moment to engage potential prospects and get the wheels turning towards conversion.

Traditionally, goals are siloed. Marketing sits at the two ends of the customer journey, with engagement at the top, and re-engagement, or nurturing, on the other side. Sales comes in only when a prospect is deemed engaged enough to qualify their time.

ABM intends to close this gap by redefining the way companies view prospects and leads. Data and real-time analytics can help Sales and Marketing teams identify prospects who may be the market and ready to purchase.

We asked John Steinert, CMO, TechTarget, how his team views ABM, and how purchase intent data can help align sales and marketing teams to improve workflow and close deals with speed.

DMN: How should Sales and Marketing teams approach workflow under ABM?

Steinert: The decision to use marketing resources versus sales resources is somewhat based on interpretation of where account is in terms of "hotness," or qualification. We generally take a step back from that first to say:

- Have we agreed on the ideal customer profile that we prefer to go after?
- Have we agreed on that profile being embedded into an account list, so we know what type of account we want to go after?
- After we've created an account list based on that profile — and do Sales and Marketing agree on that?



If Sales and Marketing can agree on the types of accounts that are most important, that's great, because Marketing doesn't send the wrong accounts to Sales, only to be told "this isn't an account we like, so we're not going to follow up."

The next thing they need to agree on is: "can we agree that we prefer to spend more energy on accounts that are showing active purchase intent, versus accounts that are not?" This becomes interesting, because it begs the question: at what point in a company's qualification as a lead should Sales get involved?

DMN: So, where is the line? How do the roles change once an agreement to change approach and focus on intent is made?

Steinert: What we see is that the more "space" there is between Marketing and Sales, the later Sales is interested in getting involved. The worse the breakage is between Marketing and Sales on alignment, the more qualified a lead has to be before Sales is willing to be involved. If you flip that around, the most the most innovative clients [we have] are the ones where Sales – thanks to Marketing – is now believing this data, and is willing to act earlier than it really ever has. They can get in the deals earlier.

DMN: How is purchase intent data different from traditional lead scoring?

Steinert: In lead gen, it's the lead – basically a person. With intent, and of course in sales, it's the account – and within the account, the buying groups. Once you've made this leap, it's about which accounts to pay attention to, and when.

This can't be about leads alone, because a single lead doesn't really tell you anything about the account's demand status. It only tells you that an individual has taken an action that looks like it could be interesting.

Many leads are actually "false positives" – there's nothing really happening at the account. And just because you don't have a lead at an account doesn't mean they aren't in a buyer's

journey. If you depend on leads alone, many accounts who are truly in a buy cycle will appear as "false negatives."

Now, the challenge is for marketers to go out and engage those folks, and get them to respond.

DMN: Where does Sales play a role?

Steinert: The question is for companies: "do we have enough time to wait for marketing to try to get these folks involved?" And the most innovative are saying, well, if they're showing what we call "prolonged intense activity," then, in fact, it's time for SDRs and Sales to get involved, even though they aren't a lead.

What we see is the real bridge between Marketing and Sales believing in the quality of the data, and then having the ability to change the service level agreements the SDRs have from a volume-oriented agreement (that's really just massive lists of people) to an account-service level agreement, where they make sure to concentrate on those accounts that are now known to be in market.

DMN: How can marketing teams use data to support Sales initiatives?

Steinert: If Marketing can work to provide the data to all three organizations [Sales, SDRs, Marketing] and if Marketing and Sales (assuming SDRs are part of Sales, sometimes they're part of Marketing) can talk about who's going do what, when, based on the intensity of the information, then you actually close this gap. Everybody's aligned, and each person has a set of roles agreed, so that there's no breakage in the process. ●



CONCLUSION

The fundamental rule here is marketers need to share access to data and take advantage of it. That's easier said than done. But, here's how to get started:

Understand the needs of your users, specifically what elements within the data will drive the most value for them.

Don't create a new process. Fit the information into their existing process so that it quickly helps them do what they already do.

Find willing participants for test efforts. Go small first.

Test and then let your willing participants be advocates for you. Successful examples will bring people to you who want to get on board.

Celebrate examples of success and then test more new ideas.

Don't bite off more than you can handle. Build a small coalition that will slowly start to snowball.

Whatever you do, don't hog the data to yourselves. The business impact of better data grows and grows the more people you can get to take advantage of it.



RESEARCH AND CONSIDERATION: USING LOCATION DATA TO DRIVE RETAIL SALES

DMN EDITORIAL TEAM

INTENT MARKETING FOR B2C: A CLOSER LOOK AT LOCATION DATA

Intent marketing produces a high ROI by paying attention to the consumer and, these days, consumers reveal their proclivities through data. Thanks to new technologies, location-based data can be used to measure intent and drive sales

Location is not a new influence on marketing strategy. Advertising to a site based on location has been available in paid search for years, while analytics reports can isolate visits according to region or city.

"If you think about the history of digital advertising, intent-based marketing has been mostly driven by web browsing," Benoit Grouchko, CEO/co-founder, Teemo, said. As smartphones came onto the scene, location data became a new way to improve the accuracy and relevancy of marketing campaigns.

Digital images, through smartphones and GPS-related metadata, have made it possible to relate activity to location. The rise of sensors adds another set of activity data suitable for geographical analysis. If you are reaching out to people who have shown a strong intent around cars, for example, it might be better to target people who visited actual car dealerships as opposed to auto-related websites, Grouchko said. This physical interaction provides a stronger signal. The consumer took their quest into the real world, and moved away from hypotheticals.

There are loads of signals that you can get with location. What you can do is take all the signals together, put them in the engine, and then automatically target users based on their intent



BY DEVICE:

A deeper analysis provides a more refined view of the locations at which customer segments generally use smartphone applications, and potentially suggests where display media tailored to that audience should be served.

Geospatial data allows marketers to vet their assumptions and make changes to their data visualizations as they see fit. With reference to culture, savvy marketers can look at building advanced models that relate spatial data to activity data associated with different customer segments:

THROUGH UNDERLYING CONSUMER PATTERNS:

Consumer intent can be determined by looking at underlying patterns. A consumer could be a frequent business traveler, for example, but might only travel to the Caribbean when on holiday, at a consistent time of year. They may research tours and book at particular times of the year.

"When it comes to trips, it would really depend on the kind of advertiser that you would want to engage with," Grouchko said.

Here are some questions you may want to ask to gauge when they'll be in the market:

- How did that person travel over the last twelve months?
- Is the person a frequent business traveler?
- Which routes is that person usually flying?
- Is the person an actual tourist?
- What kind of destinations, and when do those travels happen?
- When do the purchases happen?

"Then you combine all of that, and you're like 'okay, when is the right time to reach out to that user, to that individual, and what is the most efficient way to reach out?'" Grouchko said.

REVEALING BRAND AFFINITY:

Consumer shopping habits can reveal an affinity for certain brands. That same data can also be used to conserve capital.

"If you realize that that user is usually going shopping at a particular mall every Saturday, if you don't have a shop in that mall, it's not that interesting to engage with that user, because that user is much less likely to go to your shops," Grouchko said.

TIME OF DAY: Additionally, it can be valuable to look at the time of day. By looking at both the where and when, marketers can engage with the user at exactly right time, based on their individual patterns.



A NOTE ON DATA PRIVACY AND COMPLIANCE

That approach dovetails into how geospatial data usage can be an important analytics factor for privacy maintenance. Fields in geospatial can be fuzzy in geographical descriptions. Current privacy debates revolve around the use of data, potentially to identify someone in real-time. Because so many analytics platforms can incorporate various data sources, marketers must be aware of how geospatial data can track individuals in an intrusive way.

CONCLUSION

The end result for marketers equipped with geospatial data should be a better understanding of where potential customer interest and response is occurring. This implies geospatial intelligence: the application of human interpretation to geospatial data. This requires both people and processes to make location data relatable to a strategy.

Geospatial data and geospatial intelligence are important game changers in analytics, because they provide a robust starting point to relate consumer activity to a physical location with immediate implications. Web analytics solutions, prior to geospatial data, relied chiefly on panel data to do this – inferring demographics from third-party data.

The world is increasingly being modeled digitally, blending scientific techniques in the process. No matter what kinds of real-world consideration they encounter, marketers with an empathy for geospatial intelligence – and culture – can provide analytics refinements to aid business strategy. ●

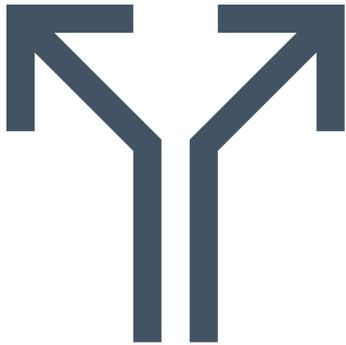


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CASE STUDY IN-STORE INTENT: HOW TO A/B TEST A PHYSICAL LOCATION

BY DAVID PRING-MILL



Web designers are very familiar with the concept of A/B testing. If team members have differing opinions on the look of a website, there's no need to get caught up in a debate about creativity or assumptions regarding user behavior.

There's a way to put those theories to the test. By serving different versions of a site to users (A and B), companies can evaluate user behavior and determine the effects of major or marginal changes on customer journey. It isn't surprising that a digital experience can be tweaked based on data, but what about a physical one? What if retailers and restaurateurs could A/B test their commercial interior design?

A/B TESTING FOR BRICK-AND-MORTAR LOCATIONS

Any business owner can adjust their store layout without technology and observe the effects. However, they might arrive upon erroneous conclusions. There are now ways to enact data-based adjustments.

I am sitting in BRÜ HAUS, a gastropub on Wilshire Boulevard in Los Angeles, California, as Kalon Welch, EVP of business development at FastSensor, points out to me exactly how this is done.

"See that little white box on the wall? There's another one just over there behind that point of sale terminal," Welch said, gesturing at three separate devices designed to track customer movements. "We're covering this entire place, including into the street. I could technically pick up the traffic that's going by. But that would confuse your numbers, right?"

Wen Yeh, co-owner of BRÜ HAUS and other hip spots, joins us at the table and explains that he has already seen benefits from FastSensor's consumer-tracking and analytics technology.

Although it is possible to predict customer behavior based on a basic understanding of psychology, it's rewarding to



“Imagine just hypothetically, showing up at a stadium, stepping across a threshold, and the usher saying, ‘If you would like LeBron to walk you to your seat, pull out your phone’”

see some of his assumptions borne out by data. One seating arrangement in the back is perceived as a bit more intimate and causes groups to congregate and linger. When they sit longer, they spend more. Each extra round of drinks, multiplied over the course of a month, can be felt in the bottom line.

“Like if you have easy access to get out then, well, they probably leave,” Yeh said. Indicating some high tables and stools near the front entrance, Yeh adds, “People who sit up there tend to stay not nearly as long.”

Although he says that servers can offer up their anecdotal insights, Welch’s technological solution gives his business the hard facts.

“The tables here are spending like 30 or 40 percent more,” Yeh said. After checking the data analytics, Yeh played around with different seating arrangements before arriving on an optimal layout that includes modular chairs. Although it isn’t possible to replicate the most effective seating arrangement in every part of the gastropub, servers now understand the hard dollar value of the space and avoid giving it up indiscriminately.

“We know certain customers, like our regulars...we’re always going to sit them back here,” Yeh said. “They’re going to hang out, they’re going to drink more.”

Beyond that, the information allows Yeh to control costs by staffing more servers at busy times, and ensuring that the location isn’t overstaffed during non-peak hours. In this way, he can better contend with the rising cost of labor.

FastSensor data can also be a goldmine for marketing purposes. By thoroughly understanding consumer behavior, a business is able to optimize all of its tactics. The technology could also be used to create augmented reality promotions by geospatially confining experiences.

“Imagine just hypothetically, showing up at a stadium, stepping across a threshold, and the usher saying, ‘If you would like LeBron to walk you to your seat, pull out your phone,’” Welch said.

HOW DOES IT ALL WORK?

“That data is being transferred live to the cloud in AWS real-time. So what we’re doing is scanning. Scanning, scanning,



“
We are picking up
their customers
in their parking
lot. By the time
they hit the front
door, we can
have our system
communicate
with their
CRM. They use
Salesforce. And
technically, they
could beam
the user profile,
purchase history,
what they were
recently shopping
for, even what
they were
shopping for
online
”

scanning. Those sensors are looking at RF signals — Bluetooth, WiFi, RFID, near field, et cetera,” Welch said.

FastSensor’s cloud-based algorithms avoid inaccuracies through multiple signal reconciliation. According to Welch, the method has proven to be more accurate than door counters and computer vision solutions.

“We’re looking at all the technologies simultaneously,” Welch said. “We’re reconciling them in the cloud and we’re counting you one time.”

The sensors are not hidden, but they could be mistaken for other forms of technology, such as wireless access points. To identify the total addressable market, Welch set a geo-fence that encompassed the area where cars pull up and people might get out. Gesturing at some analytics on his tablet, he adds: “This is a time-lapse heat map of how people move throughout the location.”

When a business sees the amount of foot traffic that they have failed to capture, they can adapt through more prominent signage or by having staff members give away free samples to lure people in.

For BRÜ HAUS, the data revealed an unusually high loyalty rate, but a lost opportunity to capture foot traffic.

“This is your rent. They pay a lot of money to be on Wilshire Boulevard to get foot traffic,” Welch said.

FastSensor is currently deployed at over a thousand locations. With consumer opt-ins, the data can be utilized more powerfully.

“We even have a system setup where I’m connected to the CRM and we have an app, with a furniture retailer in Texas,” Welch said. “We are picking up their customers in their parking lot. By the time they hit the front door, we can have our system communicate with their CRM. They use Salesforce. And technically, they could beam the user profile, purchase history, what they were recently shopping for, even what they were shopping for online.”

Armed with this information, salespeople can then guide the customer through the most relevant buying options. The customer may even feel as if their needs were intuitively understood, oblivious to the sophisticated technological toolkit being utilized behind the scenes. ●

POINT OF SALE

AMY ONORATO, MANAGING EDITOR, DMN

OPTIMIZING RETAIL OFFERS AT POINT-OF-SALE: UNDERSTANDING CONSUMER INTENT

Think about the last time you bought something online. You knew you had a need, so you researched, compared prices (or just headed over to your favorite retailer) to pick out the right item. You threw that item in your shopping cart, filled out your payment information, and bam! Purchase confirmed, and it's on the way.

When we buy things, oftentimes there's a "rush" of excitement – the term "retail therapy," or shopping to improve your mood, didn't come from nowhere. And research from transactional marketing platform Rokt may even put some data behind it.

Eight out of 10 consumers Rokt surveyed agreed that point-of-sale was one of the "happiest moments online." It's also a time when consumers are the most engaged with your brand, because they must enter in information to confirm their purchase and complete the buyer journey.

Or, that particular buyer journey. For marketers, point-of-sale can be the gateway for building better relationships with customers through related offers and loyalty opportunities. A combination of data, content, and delivery, based on intent, can help marketers get started.

OPPORTUNITIES FOR NEW OFFERS

Once a purchase is completed, shoppers are typically taken to a "confirmation page." This is where consumers can review their purchase details, and any other information related to their transaction. A transactional email that acts as a digital receipt typically follows suit, or, if a consumer opts in, a mobile text message, or SMS.

The confirmation page, or confirmation communication, is prime real estate for offering related products or services that could complement the immediate purchase.



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IN A 'BUYING STATE
OF MIND' WITH BRUCE
BUCHANAN, ROKT**

"The mindset on the confirmation page presents a unique opportunity unlike any other stage of the transaction journey," Geoff Smith, chief marketing officer, Rokt, said. "The potential data you have on this customer is extensive, as is the opportunity to capture them in this 'buying state of mind.'"

eCommerce brands are in a unique place for first-party data collection. The nature of shopping online demands input of personal data that consumers are willing to give in exchange for shipping and delivery services.

TYPES OF FIRST-PARTY DATA TYPICALLY COLLECTED ARE

- Who a customer is
- What they just purchased
- A customer's past purchase history
- Payment preferences
- Loyalty card member status
- Lifetime customer value

"This data, if used well, can be immensely powerful and should be used to determine what the next best action is for that individual customer," Smith said.

Marketers can translate relevant insights to chart the proper course of action and deliver new offers that are exclusively relevant to different audience segments.

ADDING CONTEXT TO CONFIRMATION PAGE OFFERS

Providing the right types of offers is key here. It's not about inundating a customer with deals – it's about showcasing the right ones.

"On the confirmation page, it is much easier to employ contextually relevant offers as you have intimate knowledge of who the customer is and what they just purchased," Smith said. "If they just bought an airline ticket, what's the next best action that you want them to do?"

Situations will vary depending on the nature of the prior transaction, and the level of engagement a customer has with the brand. For example, brands may want to offer new customers different discounts or incentives than loyal, high-spending customers, who are more likely to spend with the brand without a coupon.



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HIGH-TECH RETAIL?”**

“This can tie into marketers’ business goals, from driving immediate value (things like a related or complementary products) and/or long-term value, like downloading a supporting app, or signing up to a loyalty program,” Smith said.

Ultimately, data should drive this type of decision-making, Smith said.

“The good news is, by the time the customer reaches the confirmation page, there’s plenty of it to use to determine what additional messages or offers should be used,” Smith said. “Data is key to driving personalization and relevance, which in turn powers performance.”

TRANSACTIONAL EMAILS

Transactional emails are one of the best opportunities for fostering brand loyalty – but it’s also one that’s most often overlooked.

“During a transactional email...that’s the time when a customer is most engaged with a brand, because they just bought something,” Matthew Harris, CEO, Sendwithus, said. “Coming from a brick-and-mortar world, a lot of the time it’s (email) treated like something that just came out of a register.”

Harris notes that while there may be some legal guidelines on what needs to be included in a receipt email, “from a customer experience standpoint, you’re not limited to plain text.”

“I think that’s the biggest disconnect, and the biggest missed opportunity,” Harris said.

WHETHER IT’S A NEWSLETTER, AN OFFER EMAIL, OR A RECEIPT, THERE ARE SEVERAL WAYS YOU CAN LEVERAGE ADDITIONAL CONTENT TO CREATE LASTING COMMUNITY AND CROSS-CHANNEL ENGAGEMENT:

- Offer customer discounts or coupons towards their next purchase
- Invite customers to participate in a referral or loyalty program
- Provide interesting content or items that match customer preferences
- Ask customers to subscribe to your newsletter or join your social community
- Provide social sharing buttons and website links ●

CASE STUDY

CREATING AN ELEVATED CUSTOMER EXPERIENCE AT POINT-OF-SALE

BY ARIELLA BROWN



The primary measure of value for luxury buyers is getting exactly what they want, with a minimum of time and hassle. People seeking that kind of shopping experience are the ones that the luxury travel planning site, Black Tomato, caters to. To enhance its service level, the travel site has now introduced a "Panic Button" at the bottom right of their website.

Clicking the "Panic Button" reveals a banner that states: "Need to be on a plane, like yesterday? Fill in this form and we'll contact you and ease the stress."

Should that not quite live up to the sense of urgency one might feel in pressing the "Panic Button," it continues with a bolded message: "In a serious panic? Call the panic team" with a choice of two numbers and an email address.

It makes sense for Black Tomato to offer this level of personalized rush service for its customer base. Offering a truly customized travel plan, rather than a preset package delivered within 24 hours, is one way to stand out in this market.

Adding instant access to a person who will do whatever it takes to make your dream vacation come true is a way of marrying high-tech with the high-touch experience associated with luxury service. This is likely the future of luxury marketing; one which builds on convenience luxury shoppers expect, with the expanded digital accessibility to deliver bespoke goods and services. ●

LOYALTY AND RETENTION

DMN EDITORIAL TEAM

AI CAN PLAY A
CRUCIAL ROLE
IN HELPING
MARKETING
TEAMS IDENTIFY
“DRIFTING”
CUSTOMERS,
STRENGTHEN
LOYALTY,
AND MASTER
RETARGETING
PROGRAMS

Every problem begins with a “red flag.” Or, that once-loyal customer isn’t buying as much anymore.

Companies used to depend on marketers “knowing the customer” to notice those signals. That was possible when customers numbered in the hundreds. But what about hundreds of thousands?

At that point, one must automate.

AI will notice “red flags,” as it monitors a retailer’s online presence. At that point, it’s up to the company to craft the response that keeps a customer from bolting for a competitor.

Doing this is not quite as easy as just pressing a button. Although AI can be modeled to aid with customer retention, it’s up to the marketer to make best use of such tools to find — and read — signals only they can interpret.

LOOKING FOR CLUES

“It has to be dead simple. Who are my best customers? It’s an answer to a marketing question. It is not data science,” Jared Blank, SVP, data and insights, Bluecore, said.

THE MODEL CAN BE CRAFTED TO SPOT THE CUSTOMER WHO IS ABOUT TO SLIP AWAY:

- 🚩 Did the customer fail to make a purchase in the past six months? Red flag.
- 🚩 Is the customer not opening an e-mail bearing an offer? Red flag.
- 🚩 Is the customer spending less time on the web site? Red flag.

AI can be keyed to notice these events, triggering a “win-back campaign.”

“The model is focused on the marketer’s need,” Blank said.


The customer is less loyal than they have ever been. Personalized engagement is the path to retention


Albert, an intelligence marketing solution, also takes an evolutionary approach.

"Albert [the AI product] doesn't know what to do until you set the parameters for it." Charlie Guevara, VP, enterprise sales, Albert, said. "Albert comes pre-configured to operate holistically across channels."

The AI will learn from a company's data as it executes a campaign, in effect, gaining familiarity with the customers and how well it is reaching them.

While Albert is not built to be a customer retention tool, it can aid retention by finding unexpected associations that marketers may overlook.

Guevara offered the example of an online firm that was pitching loose-fitting apparel at a target audience of women between the ages of 35 and 45. The product also proved popular with pregnant women, a group the marketers were not trying to reach, but noticed once the data was analyzed. And they broadened the pitch accordingly.

When a marketer spots unclicked emails, diminished web traffic, or fall-off in purchasing, he or she can respond with personalized offers based on what is known about the customer through the AI-powered marketing platform.

"We center on personalization and different customer experiences," Meghann York, director of product marketing, Salesforce Marketing Cloud, said.

Products are commodities now, and the customer knows they are in control, York noted. If they can't get what they want from one company, they will go to another.

"The customer is less loyal than they have ever been," she said. "Personalized engagement is the path to retention." ●



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**"THE CUSTOMER EXPERIENCE:
THE RETAIL REVOLUTION IS HERE...
BUT ARE BRANDS READY?"**



ORCHESTRATING A DATA-DRIVEN JOURNEY

Interest in customer journey metrics has been rising, causing analysts to turn to self-service solutions for quick answers. The prevalence of machine learning techniques like decision trees, neural networks, and other applications has led to cloud platforms being included in an already broad range of self-service analytics choices.

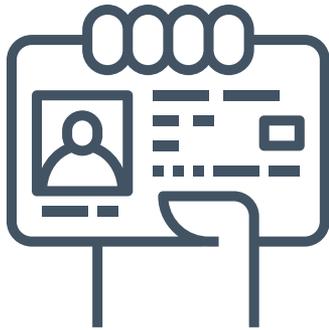
Increasing availability of tools can rapidly lead to a wide variety of analytics initiatives within an enterprise. Cloud solutions are easy to try out, especially ones aimed at data mining. They allow users to experiment with software that they feel best aids an analysis, instead of software they feel is management-approved, but not immediately helpful.

While analysts may feel empowered by making their own choice of software, they can face added complexity when comparing results across teams. Intent marketing is based on considered assumptions about customer personas, but competing approaches can generate to a lack of consensus when it comes to measurements and results.

BREAKING DOWN THE SILOS

Lack of communication can lead to a silo environment, with competing versions of best practices. Dynamic real-time data, but limited or infrequent collaboration, can mean losing sight of how to create engagement opportunities for those micro-moments.

In the case of intent marketing, poor models or planning can lead to oversaturation of customers with unwanted messages, or messages appearing on unsuitable platforms or channels. Poor placement of marketing messages is one of the banes of unaligned marketing teams.



WHAT DO TO ABOUT IT

There are steps that marketing or marketing ops managers can take. Marketers should assess the alignment of operations dealing with customer intent. This requires a deeper examination than, for example, reviewing HTML content for a webpage — a traditional diagnostic exercise before the advent of chatbots, apps, and mobile devices.

A shared version of information among users helps support data mining, data mapping, algorithm models, and communicating about the data.

But correcting assumptions and practices shouldn't trigger an outright reinvention of business processes. Marketers should instead seek incremental adjustments — particularly where predictive analytics are applied. Incremental changes can yield real solutions that match up to customer journey activity.

Keeping analytics in check is vital for keeping a company consistently on track with customer journey activity. With customers discovering new ways to service their needs digitally, marketers should seek analytics that show how a brand can understand intent, and best iterate on it.

Doing so brings analytics out of the shadows and into the ROI light. ●

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