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TOP MARKETING EXPERTS

Share Tips on Achieving Individualized Marketing:
CONNECTED INTERACTIONS



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FOREWORD

Today's digital-first consumer communicates, watches, learns, listens, browses, and buys online—every day, right at their fingertips. In fact, a 2014 Nielsen study found the average American owns four digital devices and spends 60 hours per week consuming information, alternating among them. They very much define their own experiences before many brands even have a chance to introduce themselves. Marketers are racing to compete by addressing channels as they pop up—often losing sight of the customer, and failing to weave together a cohesive brand experience.

Conversely, the expectations of marketers to manage spend and resources, prove ROI, and execute a meaningful, omni-channel customer experience is increasingly amplified.

By integrating the wealth of insights on the known customer with the digital data that anonymous audiences are leaving behind, marketers can understand consumers as individuals. Empowered with those insights, they're better able to adapt to the individual's changing needs in real time. This agility enables marketers to consistently deliver an effective customer experience across all channels of choice.

Welcome to the age of Individualized Marketing.



Regards,

David Panek

Vice President, Marketing, Teradata Marketing Applications

Across his 24 years of experience, Dave has held leadership roles in marketing, product management, and consulting at both startups and companies including Aprimo, Unica/IBM, Oracle, SPSS, and Epiphany (now Infor). His domain expertise includes real-time marketing, marketing operations, campaign management, and digital marketing. David holds an MBA from Loyola University Chicago.

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Improve marketing agility and connect with customers as individuals across every channel with the Teradata Marketing Applications.

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Businesses in all industries are learning to use individualized customer data in their engagement strategies. However, accomplishing true individualization has been challenging for many companies because of a lack of resources; shortfalls in data quality, analysis, and understanding; and an inability to execute meaningful communications with consistency and relevancy. To better understand what is working, and with the generous support of Teradata, we posed the following question to over 45 experts who are heading up Individualized Marketing strategies:

What advice would you offer a fellow marketing executive to help ease the transition to Individualized Marketing?

Although their approaches are as varied as their businesses and markets, these experts shared many insights. For example, you'll learn the importance of integrating individualized data across the enterprise for use in all engagement channels. It is the integration of that data that enables true one-on-one customer engagement, and makes Individualized Marketing especially powerful.

Of course, there is a lot more to it than that, and I'm confident you will find many valuable insights in this e-book—insights that will strengthen and enrich your own Individualized Marketing strategy.



All the best,
David Rogelberg
Publisher



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Credible advice from top experts helps you make strong decisions. Strong decisions make you mighty.

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Execute relevant, timely, individualized communications



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INDIVIDUALIZED MARKETING IS BOTH SIMPLE AND HARD



**JEFF
MARCoux**

Board Member and NW Chair,
Internet Marketing Association

Jeff Marcoux is a board member of the Internet Marketing Association. He has driven cross-product and team collaboration, supported multiple product releases, brought new products to market, created innovative content strategies, and performed channel development and acquisition integration work. He believes every touchpoint with a customer is a marketing experience—from marketing to sales to customer service. Jeff is a marketing growth hacker and technology expert who brings entrepreneurial innovation to a big tech world.



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Microsoft has begun its move toward Individualized Marketing as a strategic imperative, says Jeff Marcoux, the company's CMO Lead, Worldwide Enterprise Marketing.

"It's about building those relationships with your customers," Marcoux asserts. "Those personalized relationships are what will take them from a prospect to a customer, from a customer to a fan, and from a fan to a raving fan."

Individualization is an elegantly simple idea—and, in some ways, it can even be easy to execute. If you have a designer on staff, for instance, it's not difficult to tailor social messages aimed directly at audience influencers. "The wow factor that has driven in social engagement alone is huge," Marcoux offers.

In other ways, though, Individualized Marketing can be hard. A challenge that many companies need to tackle is pulling together massive, siloed data repositories of customer information, Marcoux explains.



Those personalized relationships are what will take them from a prospect to a customer, from a customer to a fan, and from a fan to a raving fan.

KEY LESSONS

- 1 Getting into Individualized Marketing can be relatively easy—consider sending out tailored social messaging to audience influencers.
- 2 Take stock of the systems you have in place that can be used for Individualized Marketing, and determine which key tools are still missing.



INDIVIDUALIZED MARKETING IS BOTH SIMPLE AND HARD

In the past, systems and databases were often built as needed, by and for individual business divisions. Normalizing and optimizing those data sets is an important part of getting set up to do Individualized Marketing.

“You have business groups and teams that have been running their own businesses forever,” Marcoux says. “Each has been running its own databases. The challenge is how do you bring that all together to get to an individualized level?”

Microsoft is working on Individualized Marketing solutions that can interact

directly with users. For example, working with Microsoft, one of their partners VMob built a mobile, Individualized Marketing platform for McDonald’s Swedish, and Dutch markets.

The system constantly pulls data from the users’ mobile app and also from various McDonald’s consumer touchpoints—point-of-service terminals, in-store Wi-Fi, and in-store sensors—that track customers’ in-store visits and log their purchase patterns.

“It basically learns about you over time. The more you use the app, the better your experience is,” Marcoux says.

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It means I am not a number. I am not a segment. I am me. I am an individual to your company.
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INDIVIDUALIZED MARKETING IS BOTH SIMPLE AND HARD

The platform then generates customized deals and sends them when they are likely to be most effective, Marcoux says. If a customer habitually stops at McDonald's for coffee on Tuesdays and routinely stops for ice cream on weekends, the platform learns those behaviors and responds accordingly. The program has worked well. Marcoux says McDonald's has seen average [spend increase by 47%](#) because of up sales.

Asked to advise his fellow marketers on easing their transition into Individualized Marketing, Marcoux suggests that these three questions should be asked and answered:

- Which touchpoints matter most to your customers?
- What systems do you already have in place that could easily be used in Individualized Marketing efforts?
- What types of data and systems do you still need to put in place to begin or further your move to Individualized Marketing?

To be successful, Marcoux believes that companies must begin developing tight bonds with individual customers, influencers, and advocates, maintaining those relationships by offering people positive value and gratifying experiences.

“That is where I see Individualized Marketing playing such a huge part,” Marcoux concludes. “It means I am not a number. I am not a segment. I am me. I am an individual to your company. It is not about technology, it is about personal relevance and making your brand just that little bit more special.”



JULIAN HILLEBRAND

Product Manager,
Convidera GmbH

Julian Hillebrand works as a product manager at Convidera, an innovative consultancy and enterprise software company based in Germany. He is well versed in how new technologies affect business strategies and how companies have to integrate data in their daily activities. He created the digital business blog [thinktostart.com](#) and is the author of the book *Mastering RStudio*, showing people how to use one of the most popular tools for data analysis.



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“Individualized Marketing is not about sales,” says Julian Hillebrand. “It’s about building a relationship with the customer.” To do so successfully, companies must become customer-centric, not only in the way they do marketing and sales but also in the way they operate across the enterprise. This reality is true because the main driver for Individualized Marketing is data, and that comes from many different operations within the business.

Hillebrand describes three essential aspects of a successful Individualized Marketing strategy, all of which are highly dependent on data. The first is identifying and collecting the data itself. “Many companies do not take full advantage of the data they own,” says Hillebrand. They know they have a valuable resource in their data, but they don’t know how to use it.

“There are three kinds of data in the company: customer-specific data, operational data, and financial data,” he says. “Individualized Marketing needs all this data.”



Individualized Marketing is not about sales. It's about building a relationship with the customer.



KEY LESSONS

- 1 It is important to build company operations and engagement strategy around aggregated data, because customers will engage in unpredictable ways.
- 2 A successful Individualized Marketing strategy goes way beyond affecting just marketing and sales.

The customer-specific data can include information individuals provide, individual emails, interactions with the service department, data collected by tracking their behavior at digital touchpoints, and even social media. Operational data includes data about business processes, such as manufacturing, distribution, and supply chain operations, that are the basis for product and service delivery. Financial data are revenues and costs associated with operations that enable product and service delivery. "Companies need to aggregate all this data so that they can understand what the customer

wants as well as the business implications of those preferences," says Hillebrand.

The second key ingredient of Individualized Marketing is having the tools to derive meaning from all that data. Hillebrand says, "Companies need to fully understand their data. It's not about classic key performance indicators, like they did before. They have to see the deeper business insights that data holds." These insights include understanding what a customer wants and knowing in near-real time the operational requirements and financial implications of fulfilling that desire.

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The third element of Individualized Marketing is the company as a whole must be highly integrated in their customer-centric operations. “Now that the customer is totally measurable, it becomes possible to align the customer-centric business strategy from the top down,” says Hillebrand. In the past, companies have had the advantage of knowing their basic customer path. But in times of omnichannel engagement and social data, the traditional customer path breaks down. It is important to build company operations and engagement strategy around aggregated data because customers will engage in unpredictable ways. Also, the customer is in much greater control of their engagement than in the past.

A successful Individualized Marketing strategy goes way beyond affecting just marketing and sales. Individualized Marketing

brings traditionally disconnected operations across the enterprise much closer to the customer, which makes the company more responsive to customers at an individual level. This ability affects other aspects of the operation, from managing production runs and distribution channels to more effective predictive capabilities around business cycles, and even influencing product design in ways that strengthen a competitive position in the market.

“With Individualized Marketing, companies tap data that affects operations within the enterprise that run much deeper than just marketing and sales,” says Hillebrand. In some cases, this process might take longer for an initial sale to happen, but companies are investing in more sustainable relationships with their customers.

INDIVIDUALIZED MARKETING BUILDS THE BRIDGE TO THE CONSUMER



FIONA PIETRUSKI

Chief Marketing Officer,
Shopography

Fiona Pietruski is a consumer and influencer marketing expert with more than 15 years of experience. She was senior vice president of member strategy and growth marketing at Crowdtap, one of the top-five fastest-growing marketing companies in the Inc. 500 two years in a row. Before that she was a founding member and CMO of the Shespeaks.com social activation platform; CMO for Cravebox, a VC-backed B2C service; and spent 8 years at HSBC Global E-business in leadership roles.



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As a self-described “middle-aged mom,” Fiona Pietruski often finds online shopping sites frustrating. “They are showing me pictures of twenty-somethings in summer clothes,” she says. “That is absolutely irrelevant for me.”

Her experience, she believes, is symptomatic of the huge mismatch between the amount of data that businesses collect from customers and the quality of service that customers get in return. Her company, Shopography, aims to alter that equation. “The aim for me is to harness a lot of that available data, which consumers have already handed over willingly—then turn that into smart machine learning and artificial intelligence,” says Pietruski, Shopography’s chief marketing officer.

Shopography has as its centerpiece a powerful mobile app that allows customers to find and share product purchase ideas and discuss trends. Customers can take the app into partner stores, scan Universal Product Codes with their smartphones, and share them with friends who then can view the product with their own app. “You can say, ‘Hey, I found this and I thought you might like it.’ Or, ‘Do you think this goes with these shoes?’” Pietruski says.



The aim for me is to harness a lot of that available data, which consumers have already handed over willingly.



KEY LESSONS

- 1 There is a huge mismatch between the amount of data that businesses collect from customers and the quality of service they get in return.
- 2 Individualized Marketing can build the missing bridge between consumers and retailers.

INDIVIDUALIZED MARKETING BUILDS THE BRIDGE TO THE CONSUMER

App users can curate their preferences using hashtags, or be inspired by the profiles of trusted influencers—who can be messaged directly through the app, Pietruski points out. Naturally, Shopography collects data on all that activity, building up unique data sets for direct Individualized Marketing purposes. And the company is not just sitting on that data, Pietruski notes. “We can reach out to the customer and say, ‘Oh! We see that you just bought yoga pants and a yoga mat,’” Pietruski notes. “Here are some suggestions in that product set.”

Individualized Marketing, of course, has not fully matured, nor has Shopography. To reach full potential, much more data must

be collected, Pietruski notes. Once it reaches critical mass, an existing technology—geo-sensing and in-store beacon technology—can kick into gear. At that point, Shopography will be able to make instantaneous recommendations and offer discounts, one-to-one in real time, while the individual customer is in position and ready to buy. “In practical terms, that is a little down the road for us, but beaconing is definitely where we are headed,” Pietruski comments. “Beaconing would enable us to triangulate all that consumer information into one big picture.” Consumers would have to opt in, but she is confident they will. “Our research tells us that consumers are very open to this,” she says.

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To Pietruski, Individualized Marketing is the missing bridge between consumers and retailers. “I think what we are trying to do is satisfy the consumer’s need on the full path to purchase,” she offers. “It’s knowing who I am, knowing where I am—maybe even my life stage.”

She offers a gentle reminder not to confuse priorities. Technology is the means to that desired end, she says, not the end in itself.

“It can actually be a distraction from the thing that is going to make you successful,” Pietruski concludes.

Her advice to fellow marketers hoping to tap into Individualized Marketing is basic. “You need to be laser-focused on satisfying consumers,” she advises.

“Unlock a better experience for them, using the data, tools, and technologies that you have available.”



ALAN OSETEK

Global President,
Resolution Media, an
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Alan Osetek is the global president of Resolution Media and oversees the global growth of Omnicom Media Group's search, social, and digital performance media unit. Prior to joining Resolution, he served as managing director for iProspect and was responsible for the company's East Coast operations. Before joining iProspect in 2008, he served as a board member and CRO for Visual IQ. Osetek holds a bachelor's degree in economics from Skidmore College and an MBA from Babson College.



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When making the transition to Individualized Marketing, Alan Osetek believes you must first take a holistic look at your customers and determine how best to reach them across the many channels that have proliferated in recent years. In most Fortune 500 or Fortune 1000 marketing departments, for example, newly emerging channels have helped brands reach valued consumers but have unfortunately created more departments, silos, and specializations which make it even more difficult to coordinate across channels to maximize results.

Osetek offers search as an example of how this phenomenon has developed. Search ads now can be highly customized, and ads can be targeted to individual customers or segments, with copy addressing their specific situations by offering customized prices, offers, or communications.

But while the concept of Individualized Marketing seems straight forward on the surface, there's a great deal of nuance that requires a significant shift in the way organizations think about and plan their marketing campaigns.



You need to think about realigning your marketing organization to tackle all these things at once.



KEY LESSONS

- 1 Marketing executives must consider how best to align their teams' varied skill to better address Individualized Marketing opportunities.
- 2 Companies are increasingly using their customer databases to create relevant, individualized offers on a variety of channels.


First, for organizations considering the transition from mass marketing communication to segmentation for more Individualized Marketing, “You need to think about realigning your marketing organization to tackle all these things at once,” says Osetek. “Teams need to be coordinating and working together across channels.” These teams often bring different backgrounds and skill sets to the table, according to Osetek, but they now need to collaborate more closely on campaigns. Consumers don’t exist in silos; they traverse multiple channels in their day-to-day lives and take input from a variety of sources when considering purchases.

Individualized Marketing must account for all of this, meaning each segment of the campaign must communicate with the others to ensure the right messages are being delivered in the right places at the right times. To do this, organizations can no longer have siloed teams

manage individual channels – they must all work in unison to be aware of each interaction along the purchase journey.

While each member of the organization likely has unique and valuable expertise to offer, it must be considered a small piece of the whole. For example, while direct marketers come from a one-to-one marketing background, the creative and media groups have traditionally been mass marketers. It’s all about marrying these skills in a way that creates a seamless consumer experience.

Says Osetek, “In a perfect world, you’re bridging all these best-of-breed skill sets and processes together.” In some organizations, he sees marketing executives beginning to address this by having the customer relationship management and media groups reporting directly to them, which he feels is a good first step in this direction.



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Of course, technology is playing a key role in the Individualized Marketing revolution, on both the consumer and marketer sides. Resolution Media is already taking advantage of recent developments in Individualized Marketing to help its clients speak to individual customers. One such client is a large cable company. When customers perform a Google search for “buy cable TV” or “buy Internet” on their mobile phones, Osetek’s firm uses the mobile phone as an indicator based on geo-location to serve a specific, customized ad.

If the customer clicks on the Google paid ad that comes up and then proceeds to the landing page for that ad, says Osetek, “We’re creating upwards of 100–120 different variations of that landing page, with different offers based on that ad being tied to the client’s customer database.”

By the time the ad comes up in the landing page, Resolution Media already knows if the person is one of its client’s customers and which products or services that customer already has. For instance, the customer might have phone service but not Internet service. Armed with the information about what product sets the customer already owns, they can present different offers and pricing bundles that specifically speak to that person in an individualized fashion.

If customers find an offer appealing, says Osetek, “We have click-to-call capabilities, right on their mobile phone, that bring them directly into a call center. Their customer data is brought to the call center so the call center representative already knows who they are, what products they own, their address, etc.” That one-to-one experience in the call center is seamlessly transferred from the digital realm and customers’ mobile phones.

Thanks to rapid advancements in marketing technology, it is now more possible than ever to speak to customers in such an individualized way and track those interactions seamlessly across channels, often in a single dashboard for a complete view of the campaign’s effectiveness. If a particular portion of the campaign appears ineffective, marketers can easily re-allocate budgets; adjust copy and creative; and more, for rapid optimization that can positively impact the entire campaign, something that wouldn’t be possible in a siloed view.

By thinking carefully and holistically about your organization’s approach rather than haphazardly adopting new channel after new channel, including how your marketing organization is aligned and how it is leveraging the many channels and technologies now available, your company can lay the groundwork and successfully make the transition to Individualized Marketing.

THE LEAP FROM BIG DATA TO INDIVIDUALIZED MARKETING



TRINADHA KANDI

Specialist Leader, Digital Marketing and Analytics, Deloitte Digital

Trinadha Kandi has 15 years' experience in digital marketing, digital analytics, and marketing operations. As a technology expert on Adobe Marketing Cloud and the IBM customer experience analytics and campaign management platforms, he has worked on projects in numerous verticals. Kandi received the Award of Achievement in Web Analytics from the University of British Columbia, represented the Web Analytics Association from 2008 to 2010, and presented at the Digital Analytics symposium in India in 2012 and the DMA Conference 2014 in San Diego.

 
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Customers leave behind valuable data trails as they interact with brands, says Trinadha Kandi, a Deloitte specialist leader for digital marketing and analytics. He sees a lot of companies struggling to leverage that data. However, he asserts, it is the companies' responsibility to do just that.

Brands must become highly proactive, not just in collecting the information but also understanding and analyzing it, he says. "My advice to my fellow marketers is, consider your customer data as the powerhouse for your marketing efforts, and please don't take the data lightly!"

Kandi knows data. He started his career as an engineer and developer 15 years ago before transitioning into marketing analytics. As a consultant, he has worked with scores of clients across many industries. Individualized Marketing requires a lot of deep learning on the part of businesses, but he contends that there is no alternative. After all, he says, consumers increasingly are willing to give companies their information. They demand something of value in return. "I would expect you to really talk to me, understand my needs, and deliver those to me at the right time and the right place," Kandi says.



My advice to my fellow marketers is, consider your customer data as the powerhouse for your marketing efforts.



KEY LESSONS

- 1 Consumers leave trails of data behind along their path through a brand's various touchpoints, but many companies struggle to respond.
- 2 Big data and the Internet of Things are converging to set the stage for Individualized Marketing companies who learn to tap into the powerhouse of consumer intelligence.

THE LEAP FROM BIG DATA TO INDIVIDUALIZED MARKETING

He currently is part of a Deloitte project that is tackling that challenge. It is based on the premise that customers do not live on individual channels—they use email, tablets, PCs, mobile devices, in-store kiosks, and other brand-access points. Public details about the project are scant, but its stated mission is to connect the dots of consumer intelligence by orchestrating marketing, sales, and service teams to tear down organizational silos that inhibit data analysis. In the end, it hopes to help brands act on insights derived from rich consumer data, and to shape them into positive, holistic individualized customer experiences.

Kandi describes an example of how this approach can work. Suppose someone goes online to

book a room in a hotel where they have stayed in the past. The site recognizes them and automatically reaches out with a suite upgrade, as an appreciation of their customer loyalty. In the cab on their way to the hotel, they use their mobile device to select the exact room they want. Upon arrival, the mobile key app on their smartphone lets them bypass the counter and automatically check in. They can go directly to the room, which can be accessed using the smartphone key app. The hotel knows their individual preferences, and a welcome tray in their room is laid out with their favorite teas. Upon Checkout, they automatically billed on their smartphone app for any incidentals and the reward points are credited to their account.

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I would expect you to really talk to me, understand my needs, and deliver those to me at the right time and the right place.
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THE LEAP FROM BIG DATA TO INDIVIDUALIZED MARKETING

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Today, in a fraction of a second, I can change my loyalty to a different brand if I don't get the experience that I want.

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This example shines a light on where Kandi sees Individualized Marketing headed. The future, he believes, lies in the Internet of Things (IoT). Ever-connected consumer devices and applications—Apple Siri or Microsoft Cortana are early iterations—will allow brands to continually collect, harness, and refine customer data. It is a coming phase he calls moving “beyond digital.”

“It’s going to be an IoT and big data era,” Kandi states. Consumers are aware of this shift and are preparing to take advantage. Brands, even industries, will struggle if they fail to nimbly make the shift to Individualized Marketing

by converting consumer intelligence into the customized content, products, and services that consumers will demand.

The objective is not simply a matter of staying ahead of competitors. At least as important is a company’s ability to offer positive, individualized consumer experiences through “one-on-one” marketing. We are in a consumer-centric age, Kandi suggests, in which brands are forced to place the consumer experience at center stage. The impact, he says, is already being felt. “Today, in a fraction of a second, I can change my loyalty to a different brand if I don’t get the experience that I want.”

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