



 Mighty Guides

# TOP MARKETING EXPERTS

Share Tips on Achieving Individualized Marketing:  
INTEGRATED INSIGHTS



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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



### **Mighty Guides make you stronger.**

These authoritative and diverse guides provide a full view of a topic. They help you explore, compare, and contrast a variety of viewpoints so that you can determine what will work best for you. Reading a Mighty Guide is kind of like having your own team of experts. Each heartfelt and sincere piece of advice in this guide sits right next to the contributor's name, biography, and links so that you can learn more about their work. This background information gives you the proper context for each expert's independent perspective.

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

# Integrated Insights:

Understand customers as individuals

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**Annie Gherini**  
StumbleUpon.....5



**Alexandra Tyler**  
Citi.....14



**Seiya Vogt**  
Bitly.....8



**Mattias MacDowell**  
Cisco Systems.....17

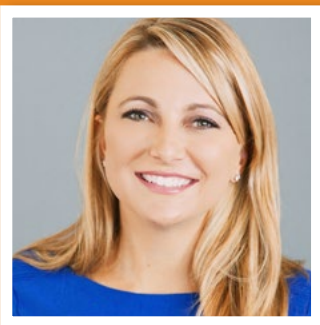


**Scott McAllister**  
Time, Inc.....11



**Leo Sei**  
Google.....20

# INDIVIDUALIZED MARKETING REQUIRES A FOCUS ON THE HUMAN CONNECTION



**ANNIE  
GHERINI**

Head of Marketing,  
StumbleUpon

Annie Gherini leads the marketing team at StumbleUpon, Inc. for both consumer and business-to-business products. Prior to joining the StumbleUpon team, Anne worked with large entertainment brands, such as Sony PlayStation and Paramount Pictures, and led the marketing for several early stage mobile and social start-ups. Her focus has been on coupling data-driven performance campaigns with strategic and engaging brand initiatives. Anne is a thought leader in understanding how to market and connect to the millennial generation.



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In making the transition to Individualized Marketing, one of the most important lessons Annie Gherini has learned is that you can't focus *purely* on data. She notes that her company is fortunate to have some of the best data scientists on staff and that their expertise is extremely valuable. She feels, however, that marketers need to remember the human connection while keeping the numbers in mind.

Gherini explains, "Oftentimes, marketers make decisions based purely on data. We have to step back and remember that these are not just "users"— there are actual people behind all these numbers." She advises that marketers need to think through the experience users are having, not simply what the numbers mean and what the data proves.

The marketing space is transitioning from a strict focus on eyeballs and impressions toward a stronger emphasis on engagement and experiences, according to Gherini.



*We have to step back and remember that these are not just "users"— there are actual people behind all these numbers.*



## KEY LESSONS

- 1 Although data is extremely valuable in informing strategies for Individualized Marketing, it is also important to remember the human connection.
- 2 Marketers have responded by adjusting their messages to be an invitation to engage with the brand rather than a hard sell.

# INDIVIDUALIZED MARKETING REQUIRES A FOCUS ON THE HUMAN CONNECTION

As a result, research is beginning to center on understanding who these different types of people are, and then taking steps to ensure that each and every experience is positive and engaging for them.

Gherini has seen this development take shape at StumbleUpon. “In user acquisition, the big change we saw was that, as you buy super programmatic ads, what you end up buying is the ability to model exactly how many users you’re going to obtain from those few banner ads.” When presented with that data, she says, you need to get granular. You need to figure out not only what the users are going to do today but also how they’re going to last as a lifetime value, and then compare that to their current cost of acquisition.

“Now we’re seeing more people spending on these engaging branded experiences that not only get the eyeballs but also give something to the customer,” says Gherini. Rather than going with the hard sell, they’re providing something of value.

Whereas before marketers might have tried to push a marketing message on the user, now they offer an invitation to engage with the brand. Marketers want to create an experience that helps customers remember the brand and have a positive feeling about it. This proven approach helps create an engaging experience with all different types of users, who are then more likely to be loyal to the brand in the future.

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By figuring out exactly who these users are and customizing the experience for each and every user, we found an increase in engagement.”

Gherini thinks the biggest benefit she's gained from Individualized Marketing is increased consumer engagement.

“By figuring out exactly who these users are and customizing the experience for each and every user, we found an increase in engagement,” she says. “This is incredibly important. At the end of the day, if you acquire superficial users, they don't stick. They don't share. They're not viral. Their value is much more limited than users who are core fans and brand advocates.” Gherini notes that it takes

more work to run these types of programs, but the benefits remain and position you well for the future.

Consideration of the human element may mean an adjustment in strategy and require a greater investment of time and effort, but Gherini believes that it's a key step when making the transition to Individualized Marketing. By better understanding customers and what they want, you can create experiences that are both positive and memorable, leading to increased engagement and lasting brand loyalty.

# INTEGRATE PERSONAL INFORMATION WITH INDIVIDUALIZED BEHAVIOR



**SEIYA  
VOGT**

Director of Demand  
Generation,  
Bitly

Seiya Vogt is currently the director of demand generation at Bitly where he oversees the entire marketing funnel. An internationally minded marketer, Vogt has experience working in the startup scenes of Tokyo, San Francisco, and his native New York. Through working at companies like Gengo, General Assembly, and now Bitly, Vogt has become an expert in acquisition, analytics, and inbound marketing.



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Individualized Marketing is an essential strategy for Bitly, a link management platform for branding, analytics, and omnichannel marketing. “We have to be very individualized because incoming customers need to understand the outcome they’re going to get from their investment,” says Seiya Vogt, Bitly’s director of demand generation.

Customer narratives vary with the kinds of products they are interested in and the different kinds of business applications. Bitly uses an automated approach that analyzes leads and lead behavior, and based on that analysis, responds with individualized content and outreach.

To make this work, Vogt relies on three factors:

- **A deep understanding of the marketing funnel.** “When you think about the steps people are taking to sign up for your services, it’s very different depending on which product you’re marketing,” says Vogt.



*We have to be very individualized because incoming customers need to understand the outcome they're going to get from their investment.*



## KEY LESSONS

- 1 The free tier is essential because it generates many more opportunities to engage and collect individual data points.
- 2 It’s helpful to use an automated approach that analyzes leads and lead behavior, and based on that analysis, respond with individualized content and outreach.



In Bitly's case, there are several ways someone can become a lead in the system. They might download a certain piece of content or sign up for a free account. "We might get 10,000 leads in a week, but as they move into the funnel, you can tailor the conversations in a much more individualized way," Vogt says.

- **Opt-in personal information.** Bitly crafts persona types based on the types of people who become leads in the system. This approach enables them to lead score early in the engagement process, based on factors that relate to the verticals their businesses are in, their interests, whether they are a decision maker, and other qualities. This information

shapes the kind of information shown to that person early in the engagement. This approach is also important for understanding the significance of the behavioral data Bitly captures while that person is on the site. "You can track that all the way down to someone becoming a customer and have a good idea of what the lifetime value of that customer will be," says Vogt.

- **Individualized site behavior data.** As soon as a site visitor becomes a lead, either through downloading a piece of content or creating an account, everything they did just prior to becoming a lead, and everything they do thereafter, is logged and analyzed.

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This method enables Bitly to see whether the site visitor is just interested in a free e-book or if they are interested in particular products, how often they are visiting, and how they are using Bitly's services. "There's one major action a person takes to become a lead in the system, but it's what they do after that that enables you to understand them on an individual basis," Vogt says.

Vogt believes having the free tier is essential because it generates many more opportunities to engage and collect individual data points. If

someone downloads an e-book for the first time, you will see that person became a lead by downloading an e-book on a particular topic. You can then present an array of related information, and based on how they respond, you can frame a discussion based on what they've already shown interests them. In Bitly's case, leads come with highly divergent and unrelated interests. "It takes a mix of demographic and behavioral data to understand leads well enough to engage meaningfully with them as individuals," says Vogt.



## SCOTT MCALLISTER

Senior Vice President of  
Digital Marketing and  
Business Development,  
Time, Inc.

Scott McAllister is a digital marketing leader with more than 15 years of experience in the space. He has a passion for redefining marketing and how customers experience brands through the digital domain. His experience spans industries—computers and electronics, financial services, retail and media—and has depth in the big five areas of digital—marketing and media, experience building, data and analytics, mobile, and social.



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When making the transition to Individualized Marketing, advises Scott McAllister, it's important to set a high-level strategy that you balance with a focus on actionable steps.

"If you start at a very high level and go at it holistically without actually thinking about how you can make a pathway into an Individualized Marketing orientation, it's possible to bite off more than you can chew," he advises.

Along with defining your long-term vision, it's helpful to identify the stepping stones that will ultimately get you where you want to go.

McAllister believes that one path to successful Individualized Marketing lies in identifying individual consumers' passion points and speaking to them in a way that captures their interests.



*We achieved massive uplift relative to what we had seen historically on a standard offer for Entertainment Weekly.*



## KEY LESSONS

- 1 When transitioning to Individualized Marketing, businesses must understand and acknowledge that there is a significant learning curve.
- 2 Understanding your customers' passions and interests is crucial to driving engagement with individualized campaigns.

With the Time, Inc., media product, which is consumed in digital format as well as in a print magazine, McAllister's team can observe individual customers' behavior and reading habits. In doing so, they discovered that many Entertainment Weekly readers are deeply passionate about the hit TV show Game of Thrones. Around the time that season five was about to premiere, they ran a marketing campaign on their website focused on heavy consumers of content related to Game of Thrones. The campaign included imagery from the show and promotional offers for Game of Thrones t-shirts. As a result, he says, "We achieved massive uplift relative to what we had

seen historically on a standard offer for Entertainment Weekly."

Although big data is crucial to success with such initiatives, McAllister advises that, in many cases, success lies in marketer instincts paired with data. "The best opportunities are going to come from having a marketer that really understands their audience well. They might be able to perceive this data at a level that gets into some of the deeper insights." This method is how the Game of Thrones campaign was conceived, originating with insight from marketers who understood their audience and searched for the data that could help them to take advantage of the signals they had spotted.

*"The best opportunities are going to come from having a marketer that really understands their audience well."*

“  
*Find a CRM you feel comfortable with that has successfully participated in your industry and has a team that supports you.*  
”

McAllister also advises marketers to find strong partners to help them make the most of their marketing technology investment. “There are several big packages out there that can be leveraged,” he says. “Find a customer relationship management [CRM solution] you feel comfortable with that has successfully participated in your industry and has a team that supports you. These are not small transitions. You’re talking about months and years here. This is not just a few weeks of a single project, so finding the right partner to work with is critical.”

Hiring is also an important factor to keep top of mind. McAllister feels that, to make an impact with Individualized Marketing, it’s wise to find marketers that are comfortable with Individualized Marketing as well as brand building. They should know how to segment customer bases, understand customers’ need sets, and present the right marketing

strategy that will elicit greater engagement with the marketing message. “I think that’s really critical,” he says. “If you have a Ferrari but you don’t know how to drive the Ferrari, you’re not going to get very far. For example, if you’re buying the right marketing CRM package but don’t have the right talent to run it, you really aren’t going to be successful.”

Organizations just beginning the process toward Individualized Marketing will serve themselves well by taking a realistic, bite-sized approach that acknowledges the scale of the learning curve involved. By hiring talented professionals that understand customer passions and can ask the right questions of the data, while selecting the right technology partners that can help them make the most of their tech investments, businesses can set themselves up well to achieve great results, McAllister believes.

# LEARN FROM THE SURPRISES



## ALEXANDRA TYLER

Senior VP, Head of Digital Marketing Global Test & Learn Acceleration, Consumer Marketing, Citi

Alexandra Tyler joined Citi in 2015 as senior vice president, head of Digital Marketing Global Test & Learn Acceleration, Consumer Marketing, Citi Global Consumer Bank. In this newly created role, she is building a new function focused on rapid global testing and learning to deliver business value across all Global Consumer Bank product lines. Tests that her team manages are targeted to create client-centric marketing capabilities to drive a shift from mass marketing to massively Individualized Marketing.

   
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Alexandra Tyler is the head of Digital Marketing Global Test & Learn Acceleration, Consumer Marketing at Citi. She's spent her career moving toward Individualized Marketing.

"Here at Citi," she says, "we strive to walk in the shoes of our customers every day."

As a digital marketer, walking in the customer's shoes requires being something of a marketing chameleon, says Tyler. To accomplish that, Tyler recommends taking a three-pronged approach to creating an Individualized Marketing program: set the right goals, spend time on discovery, and leverage your partners' experience.

Tyler suggests starting an Individualized Marketing program by setting goals that outline measurable business objectives that help you to reach truly Individualized Marketing.



*We strive to walk in the shoes of our customers every day.*



## KEY LESSONS

- 1 Individualized Marketing must start with a clear understanding of what you hope to achieve for your marketing efforts.
- 2 A data management platform provider can be one of your greatest allies in achieving Individualized Marketing.

# LEARN FROM THE SURPRISES

“Be very clear with setting those goals and make sure they are measurable,” she says. “Further, it’s crucial that they are communicated with senior management, marketing teams and across functions so everyone understands what problems they are solving for.”

Ideally, what you should be striving for is the ability to create an individualized, one-on-one relationship with your customers. Everyone in the organization must be working toward that same goal, and organizational executives must understand what reaching that ultimate goal requires in terms of funding, resources and organizational alignment.

Tyler’s second bit of advice is to spend a fair, but accelerated amount of time on discovery.

For example, Tyler says that the goal might be to guide customers to specific financial products based on their current lifestage needs or certain triggers like buying a house. To do that, the organization needs to understand what marketing channels customers are leveraging to learn about the company and then combine that knowledge with individualized data, if available.

“You have to start with the big picture and use data and analytics you already have available to ascertain what characteristics are relevant to your Individualized Marketing strategy.”

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You have to start with the big picture and use data and analytics you already have available to ascertain what characteristics are relevant to your Individualized Marketing strategy.”

# LEARN FROM THE SURPRISES

“  
Often, a lot of time is spent trying to vary marketing strategy based on characteristics that may not actually influence performance.  
”

Looking at and analyzing that data could make it easier to achieve the goal of Individualized Marketing.

Tyler points out, “Often, a lot of time is spent trying to vary marketing strategy based on characteristics that may not actually influence performance. Analyzed data gives you a good picture of what actually drives potential variances in performance and how you might leverage those variances.”

Tyler noted the third prong in an individualized strategy is to leverage the knowledge and expertise of data management platform providers, if companies are using one. They can be one of your greatest allies in achieving Individualized Marketing.

“You want to meet with them and leverage their institutional knowledge. They have probably spent a lion’s share of time focused on the exact questions around how to create more Individualized Marketing.”

They’ve seen what works best, Tyler explains and “they’re motivated to enable your success and link with theirs, so take advantage of the experience they might have that you might not.”





## MATTIAS MACDOWELL

Data Scientist,  
Cisco Systems

Mattias MacDowell is a 13-year digital marketing veteran, serial entrepreneur, and data scientist. Currently, he is focused on driving increased engagements through microtargeted marketing programs for Cisco Systems. Previously, MacDowell founded and exited several businesses including a medical device company as well as an online retail store. He thrives on challenging the status quo while remaining true to proven marketing principles. MacDowell lives in Wilmington, North Carolina, with his wife and three children.



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Marketers think of Individualized Marketing as crafting individual communications and interactions with customers based on data that is unique to them, and in this way, increasing the business value of those individual customer relationships. That is Individualized Marketing. However, it can take very different forms in different kinds of businesses. Individualized Marketing is playing an increasingly important role in business-to-business engagement. A good example is a program Mattias MacDowell runs in his marketing work for Cisco.

Cisco is a widely recognized technology brand that sells enterprise-grade technology solutions. The decision cycle for purchasing these kinds of solutions is typically long, and it involves a number of decision makers and influencers. Effective marketing in this environment requires a long-term, influential strategy. An Individualized Marketing approach must touch everyone involved with relevant, timely, individualized communications that recognize their different roles in the decision process.



*People in the HR department will receive different communications from those in the executive suite, and all the messages will be individualized based on what we know of their interests.*



## KEY LESSONS

- 1 Individualized Marketing communications have a much greater response rate compared with generic communications from the company.
- 2 To successfully implement this approach, you must continuously collect data and update the lead file with more individual attributes.

This approach can be tricky, especially in a large enterprise environment where, at any given time, multiple overlapping, multichannel marketing programs exist. Coordinating all those marketing communications is not realistic because not all of the marketing efforts have the same goals.

MacDowell's program is specifically designed to develop individual relationships on behalf of field sales representatives. He does this through a real-time individualized communication strategy that feeds relevant event-related information to leads. The events can be demos, training opportunities, or conferences happening within 75 miles of the lead, webinars, downloadable white papers and reports—anything that has gated access.

A key part of this approach is mapping all events every month to every lead, tying the events by job function, company vertical, job level, whether an event is local to that person, and topical interest scoring based on a person's website activity.

"All this data ties to an email program that comes from the sales representative associated with that lead's account," says MacDowell.

Every communication targeting a particular individual comes from a field sales representative who would be known to that lead. And the contents of the communications are based on data provided by the individual, including the prospect's real-time Web activity such as the events and content assets they view.

*“When someone receives a message from someone they know, and it contains something relevant, timely, and useful, then we have a significantly increased engagement.”*

“  
When we started designing messages based on interest scoring, we saw a drastic increase in engagement with email, and that was a nice surprise.”

In this way, MacDowell can reach different influencers at a particular company with communications containing information of interest to them, coming from people they know.

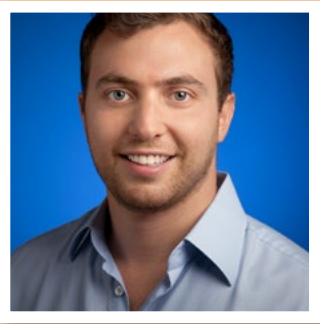
“If it’s a human resources [HR] solution, people in the HR department will receive different communications from those in the executive suite, and all the messages will be individualized based on what we know of their interests,” MacDowell explains. This Individualized Marketing strategy has proven to be hugely successful. Individualized communications have a much greater response rate compared with generic communications from the company.

“When someone receives a message from someone they know, and it contains something relevant, timely, and useful, then we have a significantly increased

engagement,” says MacDowell. The biggest gains came when they began combining interest scoring data based on website activity monitoring, with opt-in information the leads provided themselves at various gated events. “When we started designing messages based on interest scoring, we saw a drastic increase in engagement with email, and that was a nice surprise,” says MacDowell.

To successfully implement this approach, you must continuously collect data and update the lead file. Data can come from your interactions with individuals as well as data from third-party sources that is relevant to those individual leads.

“You must keep attending to this customer file, keep adding more and more attributes, and track what they are doing at the website,” says MacDowell.



**LEO  
SEI**

Product Manager,  
Google

Leo Sei is a product manager on the Google AdWords team. In this role, he focuses on AdWords power user tools, such as bulk changes (from automated rules to AdWords scripts), upgraded URLs, and business data management. Sei has a master of science degree in computer science from Imperial College in London and a master of science degree in network security from Telecom ParisTech.

   
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A successful approach to Individualized Marketing, according to Leo Sei, involves tailoring your ad to each individual at the moment when they're looking for your product. Taking context into account is particularly important. When a person is searching for something, that search is taking place within a certain environment.

"So whether it's on mobile, on the go, outside, or inside, the more information you can gather about this environment around them, the better you can make your advertising pop out of the mix," he says.

Sei remembers one impressive example in which a hotel chain used flight cancellation data to better focus their advertising. "They realized that when there were a lot of flights being canceled at a given airport, a lot of people started searching for a hotel online," he says.



*The more information you can gather about this environment around them, the better you can make your advertising pop out of the mix.*



## KEY LESSONS

- 1 Technology cannot be ignored when creating Individualized Marketing. Your ecosystem should be agile and flexible.
- 2 The faster you can learn what works and what doesn't, the faster you can improve your Individualized Marketing efforts.

“As soon as some of the airports had a higher than average cancellation rate, they would increase their bidding into the airport region. That would make them really relevant.” A traveler, stranded at the airport because of a delayed flight, would then find an ad individualized to their actual situation, such as a hotel room available in San Francisco, and would then be more likely to act on the offer as a result.

Sei also notices that some of his clients are beginning to use audience data or first-party data in their campaigns. “Not all of them are doing it, though,”

he adds, noting that it looks like there is still a silo between marketing data and customer data in many cases. “I think advertisers could benefit a lot from joining those data because they have an immense amount of data on their customers,” he offers. “The key to Individualized Marketing is making sure you’re sharing everything you know about your customer through the marketing funnel so that when you touch that customer again, whether it be via the Web, email, or social, you actually can embed the data you know about them into that advertising.”

“  
*They realized that when there were a lot of flights being canceled at a given airport, a lot of people started searching for a hotel online.*”

“  
Mentioning that you know who they are makes the ad incredibly more tailored. The impact on engagement you'll get on those advertisements is really key.”

There are many ways in which marketers can use first-party data to better individualize their messaging. Airlines that have data on their top-tier frequent fliers, for example, can make sure that whenever those customers see advertising from the company, their status as top-tier fliers is recognized. “Mentioning that you know who they are makes the ad incredibly more tailored. The impact on engagement you'll get on those advertisements is really key,” Sei advises.

In sum, businesses looking to make the transition to Individualized Marketing can begin doing so in multiple ways. By understanding the

external factors that might influence the mood or the behavior of their customers at the moment customers are searching for specific products or services, companies can increase their relevancy with well-timed ads and offers. By examining the data they already have in-house and considering how it can be used to better individualize their marketing, then trying to implement those customizations at scale with programmatic methods, companies can also better refine and individualize their messaging. In pursuing those strategies, they can increase engagement and generate greater sales opportunities for the company.

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