INSPIRED MARKETING

ISSUE 8 | FALL 2020

GETTING THE
MOST OUT OF RESPONSYS
(AND B2C IN GENERAL)

8 DO'S AND DON'TS OF
EMAIL MARKETING DURING A CRISIS

5 REASONS TO
LOVE AN UNSUBSCRIBE

OPTIMIZING A LEAD SCORING MODEL

HANNAH KRANICH

OF DOW JONES ON HOW LEVERAGING MARKETING TECHNOLOGY ENABLES INSIGHTS INTO THE CUSTOMER JOURNEY

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At Relationship One, we empower organizations to modernize their marketing strategy, technology, and data. From strategy to implementation, best practices to managed services, we support the full Oracle CX Marketing and Oracle Data Cloud product portfolios. With a core staff of experienced marketing consultants, integration specialists, data analysts, and development gurus combined with our library of AppCloud apps, we've earned a reputation for delivering solutions tailored to our customer's unique business needs.

OUR MISSION IS SIMPLE — INSPIRE SUCCESS.

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INSPIRE SUCCESS

LETTER FROM THE EDITOR

Ron Corbisier
FOUNDER AND CEO | RELATIONSHIP ONE

The year 2020 will certainly be remembered for years to come. The disruptions of the Covid-19 pandemic have been felt across the globe, across industries, across communities, and across every conceivable demographic. These disruptions have not only presented unique business and personal challenges, they have also revealed our resilience, perseverance, and shared commitment to each other and our communities. At Relationship One, we've been fortunate to help marketers like you manage through the uncertainties and continue to find ways to connect and communicate with clients, partners, and employees in personalized and human ways at a time when those qualities have mattered most.

While the pandemic has driven us further apart physically, we are all finding ways to come together virtually and with greater purpose and impact. It has also reminded us that human connection and empathy are at the heart of our existence. In our ever-changing marketing world, we continue to note a movement toward more customer-centric communication, providing personal and compassionate experiences across the customer journey. It is easy to get lost in the details of developing these experiences — data management, marketing technologies, AI, and more — but we should not forget the critical importance of creating strong human connections. If nothing else, 2020 continues to remind us of our "why."

In this eighth edition of our Inspired Marketing Magazine, you'll find examples of marketers like you discovering new and exciting ways to drive customer engagement and nurture deep connections with their audience. Most importantly, you will find "heart." You will see how brands have not just weathered the storm, but they have found a silver lining. The human connection is what really keeps us together, not physical closeness. As marketers, we have the power to continue driving these connections through memorable experiences.

MOST IMPORTANTLY, YOU WILL FIND "HEART." YOU WILL SEE HOW BRANDS HAVE NOT JUST WEATHERED THE STORM, BUT THEY HAVE FOUND A SILVER LINING. THE HUMAN CONNECTION IS WHAT REALLY KEEPS US TOGETHER, NOT PHYSICAL CLOSENESS.

Hannah Kranich of Dow Jones shares details of a project to accelerate revenue by improving their ability to target the right person at the right company with the right message. You might be surprised to learn some of the unexpected benefits the organization realized as they delivered this project. You'll also have an opportunity to hear from Joann Tillman, a recent Markie winner at Cisco, about how they implemented a communication strategy supporting their partner news hubs with PathFactory.

A panel of communication and customer experience professionals in the healthcare industry will share critical insights on effective communication in the midst of the global pandemic. Meet Lauren Cislak of Indiana University Health, Dan Weaver of UCHealth, Craig Kartchner of HonorHealth, with Ross Jacobs of Oracle as they share insights on their operational adjustments well as key lessons about teamwork and collaboration in times of crisis.

We're also pleased to share some great original content from our consultants on topics including Responsys platform value maximization, email do's and don'ts in a crisis, and knowing when to choose an awareness campaign versus an acquisition campaign. We've also included insightful pieces that illuminate best practices like using audience information you already have instead of asking for it (again), building core nurture campaigns you might not have already built, loving your unsubscribes for all the good they can do, and how AI continues its push into email marketing.

This is some of the best original content we've ever offered. Our consultants continue to excel in sharing their experience and learnings as they serve many of the world's signature brands. Grab a warm cup of your favorite blend and see what you can take away from this issue to inspire your own journey.

STORIES OF MARKETING INSPIRATION

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REALIZING SUCCESS WITH THE ORACLE MARKETING CLOUD

Sharing stories of inspiration is what we do. This magazine is full of ideas, best practices and innovative marketing techniques that will inspire you to do your work.

Throughout our Inspired Marketing podcast, we've spoken with modern marketing leaders across all industries to learn more about their modern marketing journeys. We share these stories to help fuel your inspiration, drive you to excellence and teach you more about the marketing automation platforms you love.

This is always our favorite part of the magazine. Prepare yourself for fresh ideas and knowledge from industry experts. In this edition of the *Inspired Marketing* magazine, we will learn from Dow Jones, Cisco and a COVID-19 Panel of Marketers in the Medical industry.


HANNAH
KRANICH

- Cover story -

OPTIMIZING A LEAD SCORING MODEL

How leveraging marketing technology enables insights into the customer journey

HANNAH KRANICH IS THE DIRECTOR OF GLOBAL DEMAND GENERATION AT DOW JONES, A POSITION SHE'S HELD FOR THE LAST TWO YEARS. HANNAH SHARES HOW SHE AND HER TEAM IMPROVED THE LEAD SCORING AT DOW JONES AND SOME OF THE KEY LESSONS SHE'S LEARNED DURING THIS PROJECT. SHE ALSO DISCUSSES HOW TECHNOLOGY HAS QUICKLY CHANGED OVER THE LAST THREE YEARS AND WHAT DOW JONES HAS BEEN DOING DIFFERENTLY TO ADAPT TO THE CHANGES.

RELATIONSHIP ONE HOST, SCOTT INGRAM: Today on the Inspired Marketing Podcast. My guest is Hannah Kranich. Hannah is the director of global demand generation at Dow Jones. Welcome to the show, Hannah.

HANNAH KRANICH: Thanks Scott. Thanks for having me.

SI: Yeah, so let's get into just a little bit of context. Why don't you tell us a bit about yourself, your role and about Dow Jones for those who aren't familiar?

HK: Sure. Well, you already gave me a great intro. I look after demand for Dow Jones, particularly focused on our B2B products, which we group under an umbrella that we call, internally, the Professional Information Business or PIB, and under that umbrella sits several different product lines: risk and compliance – which encompasses a very large suite of products, Factiva newswires, and Factiva API – also known as DNA in the marketplace. I've been at Dow Jones for about two years. Prior to Dow Jones, I spent about five years at Bloomberg and prior to that, I worked at several startups.

R1: Excellent. And all in New York city! Well, I know we're going to talk today about how you've brought more intelligence into your lead scoring. Where did that initiative start? What were you guys initially trying to solve for?

HK: We really started with a goal in mind to drive revenue faster and to be able to target the right person at the right company with the right message. I know a lot of us are focused on that and while it sounds really simple, it's actually pretty complicated. Because the only way to really do that is to identify which companies are the right fit and also to identify when they're in the market and that's a pretty big project. So that was our North star for this project.

SI: Excellent. And I'm one that I like to just skip to the end. My wife actually does this with real books. She will read the ending. I don't do that, but in these instances, I like to just kind of understand. What are you seeing? Now that you've been at this for a while, what sort of results are you seeing? And then we'll kind of fill in the details in the middle.

HK: Sure. So if we skip to the end, and I hesitate to say that we're at the end because I do think that this is a constantly evolving project. I will say, we've learned a lot about our customers, about our products, and how we interact operationally. The things that we've seen come out of this, process-wise and results-wise, include greater alignment between sales and marketing—because we're working primarily from the same data set and also through the same logic. And also how we're approaching our projects—targeting what is important to us and what's important to our customer. We're also seeing a lift, which is great right? That's what we want. There's several elements in that lift, but we are definitely seeing a faster speed to lead and more opportunities or greater opportunity pipeline.

SI: That's great stuff. And I love the sales and marketing alignment piece. I imagine a lot of that probably came from the conversations that this

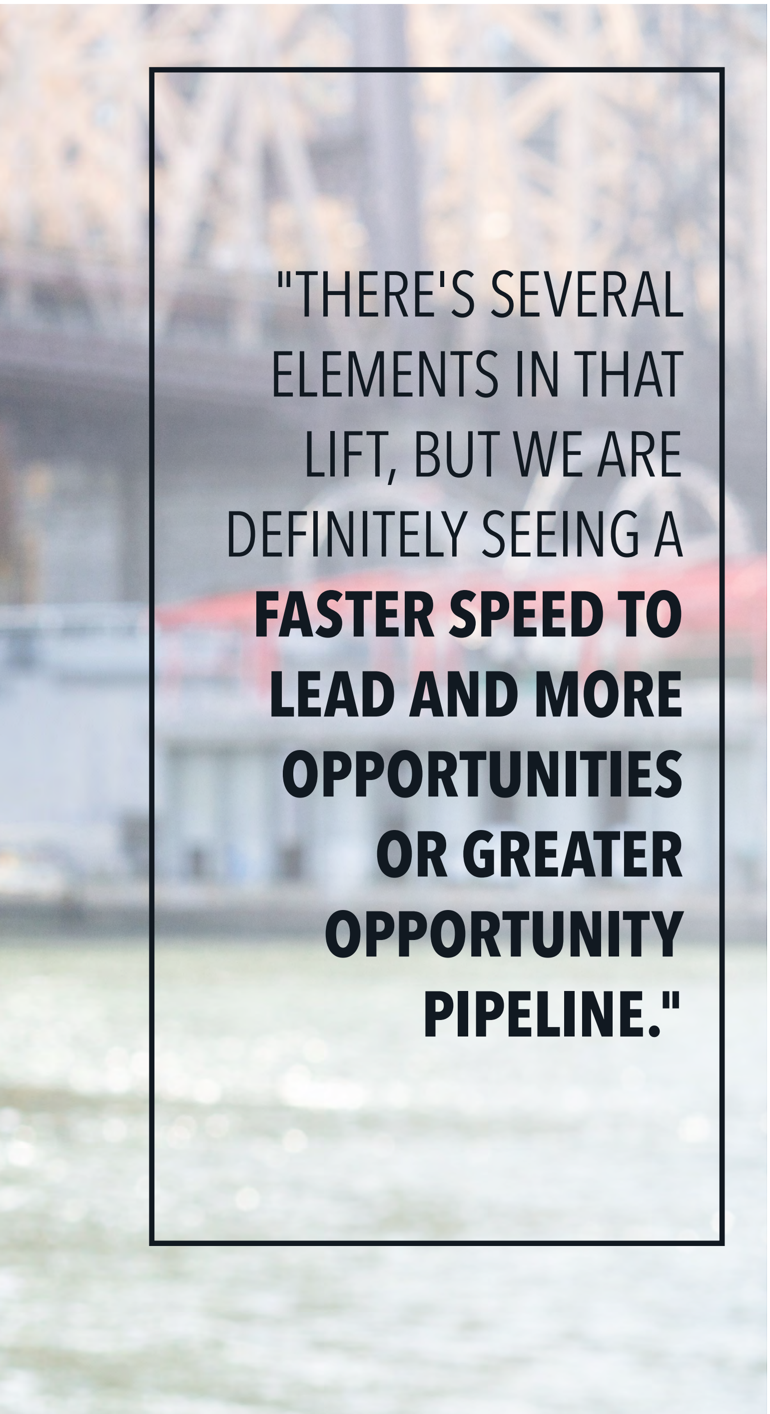
project just sort of necessitated, right. And getting everybody on the same page and getting clear about definitions and defining what actually is a valuable lead, those kinds of things.

HK: Yes, absolutely, in several ways. We have had countless meetings around what kinds of enrichment attributes we would want to layer into our leads and contacts and account records. And that really gets into choice right? What firmographic, technographic, and which intent signals resonate with our audience. All of those meetings were between marketing and sales and product.

SI: Excellent. Excellent. All right. So, now that we know the ending, let's go back to the beginning. We talked about kind of why you went down this path. How did you do it? How did you start?

HK: Wow. There's a lot there. I think it might make sense to talk around the steps. There were lots of milestones. The first one probably was around getting clean data out of our systems. I think that's something that we all struggle with because all of our CRM instances grow organically. And then outside of our CRM ecosystem things happen, right? Life changes, people move from company to company, companies are purchased. So making sure that data was clean for our partner in this, for our model developer was very, very important and that took a while. So that would be the

first step. The second step was really thinking through what those models look like. We aligned our AI driven models around our product lines. So we have four key product lines, and then we divided up our data along those lines as well. We took two years worth of our wins and losses and we divided them by product line, even when there was overlap. That was fine. The next step was letting the machine learn about those wins and losses. That was probably the next biggest step. So the strategy behind the models, and then building out those models with clean data. And once we had that analysis and a working model, it was around connecting pipes, which can sometimes be easy and sometimes be hard. In our case, I would say it took longer than the average, but it is now working. So connecting pipes included connecting this third party to our marketing automation platform, which also connects to our CRM platform. All three have connections between them.



> "THERE'S SEVERAL ELEMENTS IN THAT LIFT, BUT WE ARE DEFINITELY SEEING A **FASTER SPEED TO LEAD AND MORE OPPORTUNITIES OR GREATER OPPORTUNITY PIPELINE."**

SI: Got it. Now, in addition to connecting the pipes, what did you find to be the hardest part? And the other way I like to think about this as if you were starting over again today, knowing what you know now, is there anything you would've done differently in your approach to the project?

HK: At the outset, we set pinned expectations to the average integration time or average amount of time these projects take. And the truth is that our data is really complicated, just like probably all of your listeners, and it took longer than we anticipated. So I think if I was to redo this project, I probably would change that timeline a bit.

SI: Yup. And that expectation management is such a key piece, right?

HK: Yeah. And then also, because things were taking a long time, we definitely were building the airplane and flying it at the same time. We had a list of companies we knew were high fit and high intent. We were targeting them via programmatic media buys and we were also still connecting the pipes.

SI: And you had kind of more traditional lead scoring in place before this, right? So this wasn't let's invent lead scoring completely out of the box. You were starting from somewhere.

HK: Yes. We certainly were starting from somewhere. We had what I would consider actually a fairly advanced lead scoring in place. Because we were looking at fit and engagement, our team, meaning our sales, is very familiar with the types of leads that were coming in, and knew how to differentiate between a sales inquiry, which would be our highest and somebody who met a threshold for an MQL and was coming in because of their engagement and their title or their company that they're working for. But we really wanted to go one step beyond that and look at propensity to buy, or in other words, the propensity to become an opportunity and have that be really specific to our business lines. So, why is this company actually a company we should be targeting and why now, and we were looking to go that extra step.

SI: Yeah. Great stuff. So what other outcomes have you seen from this? I mean, have there been other kinds of wins and successes that were side effects from this effort?

HK: As a whole, we are a very tech curious business unit. The sort of leading marketing teams that serve sales and marketing with technology solutions. Because of that, we had the added benefit of really deep diving into the MarTech and sales enablement opportunities. You know that big map that they threw up at all these conferences with like a million different technologies, that are now part of your marketing or sales tech stack? I talked to probably half that map, which is a super positive experience for me because I got to have more context around all the different benefits, which ones would work for us, how to call them a little bit, and narrow down our focus. We laser focused on them. I would also say that both me and our CMO talked to several of our counterparts at other companies and they were very open about technologies that worked for them. That was another huge benefit.

SI: I love that. It was fun talking with you about that earlier when we were doing the prep for this and this is something that's just great about this community is how open everybody is and their willingness to share what's working, what isn't working and their experiences with all of this stuff, because it's certainly not getting any simpler.

HK: No. In fact, I've been reading recently that as people look into 2021 there might be a reaction to technology expansion and a sort of narrowing. I feel like we've been pretty laser-focused at Dow Jones, but I have seen other places where lots of technology is built out.

SI: Let's talk about kind of the technology and how that fits and maybe what is your philosophy around marketing technology?

HK: I think for us, we really have a pretty lean team. Technology is what enables us to be efficient and to scale. It's almost like another member of the team, right? We use it in lots of ways. We've used it to help our brand marketers to build out their own landing pages and their own emails in a drag and drop platform. For example, we use it to auto route our leads which is something that was not in place a year ago. There was literally a person who was manually routing leads, and that became difficult as the business scaled. For us, it's a key member of our team and our processes. It's also how we want to serve our customers better. We've moved forward with redesigning our website and we're moving forward with adding greater customization so that we're really speaking to the particular company in the midst of their journey and servicing them with the right content at that moment. And that's something that wasn't available three years ago. But now you see several companies and technologies that you can choose from to help you do that.

"TECHNOLOGY IS WHAT **ENABLES US TO BE EFFICIENT AND TO SCALE."**

SI: That's great, so, what's next? Where are you guys going from here?

HK: I think we're gonna keep digging into the data and keep staying data-driven and data-inspired. We have an internal CDP and a great data team. We keep adding more and more of these pieces into that CDP. They help us create all kinds of reporting around that and Tableau, but also to create tools. So, we have cross-sell tools helping us identify which companies are the right companies to cross sell to or to look into right now. That's only possible with these data ingredients and without it, you're looking at the same set of information you might have in your CRM systems.

SI: Now, what about the tools and apps that you can't live without in your own life?

HK: These are probably some that lots of people share, but I am a big fan of G suite, obviously. The whole G suite set. We were an entirely Google ecosystem at our org. Our team uses Asana to help us manage all of our projects and tasks and assignments, including our creative team. We are slacktivist, as they like to say, so we've really moved everything into Slack. I love it. It's really fantastic. Especially now that we're in this global pandemic and many of us are working from home, it's made virtual working much easier.

SI: Absolutely. Hannah you have inspired us and we call the show inspired marketing. So I always like to ask, what is it that inspires you?

HK: I'm going to geek out here and say that I really get inspired by the clever use of technology, new technology popping up and new ways of using technology. I've seen some really clever ways, even in the last couple of months since we've been working from home around direct mail, which is the oldest marketing tactic in the book. But now it's being used in entirely different ways. I would say technology innovation.

SI: Fantastic. Well, Hannah, always a pleasure talking with you. Thanks for sharing your story with us today.


ARCHITECT

CISCO

PARTNER COMMUNICATION HUB

JOANN TILLMAN IS THE PARTNER OMNICHANNEL STRATEGY LEAD ON CISCO'S GLOBAL PARTNER MARKETING TEAM, FOCUSED ON ENHANCING THE PARTNER EXPERIENCE. SHE HAS SPENT THE LAST 15 YEARS IN THE MARKETING STRATEGY AND AUTOMATION SPACES ON BOTH THE CLIENT AND CONSULTING SIDE. HER UNDERSTANDING FROM HIGH-LEVEL STRATEGY THROUGH TECHNICAL IMPLEMENTATION GIVES HER A UNIQUE ABILITY TO TRANSLATE MARKETING THEORY INTO ACTIONABLE PLANS AND RESULTS AND ALLOWS HER TO PRESENT INNOVATIVE SOLUTIONS THAT POSITION ORGANIZATIONS FOR CONTINUED GROWTH AND SUCCESS.

RELATIONSHIP ONE HOST, SCOTT INGRAM: **Today on the inspired marketing podcast my guest is JoAnn Tillman. JoAnn is the Partner Omnichannel Strategy Lead at Cisco. Welcome to the show, JoAnn.**

JOANN TILLMAN: Hi, thanks for having me.

SI: **Yeah. Good to talk with you as always. Why don't we start with just a little bit of context and I'll just, have you tell us about yourself, your role and about Cisco for those who aren't familiar?**

JT: Yeah. Sounds great. So I work on the partner experience team under the global partner marketing team here at Cisco. And what we're responsible for is the strategy of how we're marketing to, with, and through our 60,000 partners. Definitely our partner ecosystem is huge and important to us. They account for more than 85% of Cisco's revenue and so how we communicate to our partners, keeping them happy and keeping them informed is really important. And then my specific role here is the strategy behind how we market to our partners from both a channel and tool perspective.

SI: **Fantastic. Now you are here because you just won a Markie.**

JT: I did, our team did! We finally won. We are super happy about that, our team has been submitting for a little while and finally got that win. So we're super excited about it. It all centers around our partner news hubs that we set up and you know, just super excited for this program to see the success and really happy to see that recognized. You're always trying to innovate and do cool things as a marketer, but just you that recognized among your peers is really awesome.

SI: **Yeah, that's fantastic. It is getting harder and harder to win those things. So that's quite the win. Why don't we talk about this at a high level, what exactly are these partner news hubs?**

JT: Yeah, sure. What they are is we've got several different partner news hubs that are specific to various audiences. We've gone through a process of defining our key personas. We have a few other audiences, like our distributors, our service providers, and our managed service providers. And the goal here was to set up a one stop shop where our partners could go, based upon their role, to get all of the information that they need. We do these ongoing voices of the partner surveys, and from other different feedback sources, partners that were saying there's so much information. There are multiple domains, multiple sites, you got your sales training over here. You've got your marketing campaigns over here now. Where do I, how do I stay on top of it all? And the answer is not just to push more email.

These really were stood up as a way to solve for a lot of that. And so we've got a whole process in place of content submission to dedicated audience managers that help to curate that content. And then it's all aggregated into these partner news hubs that are stood up for sellers, for marketers or executives for the different audiences, so that they can go to, they can bookmark, they can return. And then we have a number of different ways that we drive there, but ultimately there's constant content flowing in and out of these news hubs. And ultimately they can go there and it's their one stop shop to get up to date. What's the most important thing is that me, as the partner seller needs to be aware of, that me as a partner executive needs to be aware of, or as a distributor what's the latest promotions and incentives, what's the latest training that's out there? We are pulling everything that lives in different places in the Cisco universe all together into a hub that's dedicated to their role.

SI: That's fantastic. Now I'm one that likes to kind of skip forward to the end and know what happened. So maybe you can talk about just the results you're seeing and how this has worked out for you.

JT: Yeah, definitely. So, one of the goals to accomplish this one stop shop was to provide all the news that they needed, without increasing email. And actually what we saw is when we compare this year over year, we sent 20% less email campaigns out the door. But we've got an increasing growing subscriber base of several thousand in our subscriber emails. We're seeing regularly 10 to 15% unique click through rates. So folks are signing up and they're staying highly engaged. And then the tool that we use, PathFactory, helps us implement these news hubs and gives us all kinds of really great in-depth content consumption metrics that we can look at. For example, binge rate is one of the things that you use to gauge once you get them to the hub site, how much are they staying and engaging with multiple pieces of content?

PathFactory is an AI-driven content journey platform. Brands are able to fuel every stage of the customer journey with real consumption data and intelligent content.

We're regularly seeing around 30% binge rate, which is fantastic. And that's the indicator we look for. When we have an email send, you might send them to one piece of content and they look at it and great, you got them to engage, but really what this lets us do is get them to the site, then they engage with one thing that's relevant to them, and there's a whole topic system where they can filter and continue engaging with content. One of the other things that we look at is the average amount of time spent on content. So anything over three minutes is considered great. We usually have like a four and a half to five minute average engagement time. So we're getting them there. We're keeping them there, they're subscribing, and then they're continuing to engage. We have a lot of returning partners, so that's really fantastic to see.

SI: Awesome. Awesome. Well, let's go back to the beginning and just talk a little bit more about what really prompted this, what were you trying to solve for and how did you really embark upon this journey?

JT: Yeah, definitely. So again, from what we were seeing from some of our voice of the partner surveys, it was really just trying to solve for that challenge of "there's so much information all across the Cisco technological landscape in multiple different places" and what's a thoughtful way to bring that all together. And so that was really the core issue that we were trying to solve for. We also have very distinct audiences, so we have clear personas. We have distributors, we have service providers and others. So, we looked for a way to bring the content together in a way that could speak directly to that particular audience. So that's why we've got the multiple different news hubs that we stood up. Each for some of our key different personas. We have five different persona hubs right now, and then three others that are stood up and a couple of regional ones as well. But that's ultimately what we're trying to solve for is what's a thoughtful way to really pull all that content together.

SI: And as you worked through this, I mean, what were some of the most important steps along the way?

JT: Yeah, so I have to say normally just in general, a big part of making a change like this is the internal change management. And that went really well for us. Any of the leadership or stakeholders that we spoke to and explained to them the concept of what we were trying to do, it was instant buy-in. So that was definitely a critical part of the overall approach and strategy, but it really went very well for us because I think ultimately people understand what we're trying to do here. We're trying to make it easy. We're trying to reduce friction. We don't want people having to search all over the place for what they need. And so that went over really well. A couple of the other things that we did was really having a heavy focus on streamlining of that content management process.

So, we've got well over a hundred submitters from all across the organization. Some are marketers and some are not, so there is a wide mix there. At this point, we have thousands of pieces of content that have run through these news hubs at some point in time. We have a couple of audience managers, that are dedicated to each individual news hub for each different persona or audience. This is not their full-time job. They have other things that they're responsible for, but we tapped into them because they're truly the thought leaders in this area. They're the ones that have a finger on the pulse of what's most critical to a technical engineer and know what the most important information is that a distributor needs know right now. And so, we had a heavy focus on streamlining that content management and the overall review process as much as possible, which has really benefited us.

We brought a content agency in on the front end, so they help with the initial review, kind of validating to just make sense for the audience. They might make some recommendations of what's the best way to present this from a title or positioning standpoint. And then we've got the audience managers that do that final review, give them input, make sure that it's relevant to their audience. And then some agencies on the back end to handle all of the nitty gritty publishing and uploading and those types of things. So really focusing on that streamline because of the sheer scale of what we were dealing with was super critical and super important along with all of the internal by-in and those types of things.

SI: Yeah. Now what was the hardest part? I mean, if you were starting over again today, knowing what you know now, is there anything you would've done differently?

JT: Yeah, so I would say that the hardest part for us was potentially very unique to our situation. We are dealing with partners and training for partners. A significant amount of the content that we needed to promote and to get out to our partners is entitled. It's protected and it's gated. You have to be logged in as a partner that's been validated in the system. Getting partners to the page was easy enough and then once they were engaging with the content if they hit something that was entitled, there were a few little technical things that we had to work through. So that was really the biggest challenge. I don't know how much that would be impactful to others. One thing that I will say that was really, really great is the partnership that we have with PathFactory as a vendor and who provides the tool.

So, every crazy little problem that we had that was completely unique to Cisco and our situation, we would just throw it at them, and they'd come back with some magic coded solution that solved everything. So, it was really great to work with them. But yeah, like I said, some of the technical stuff that I feel may be somewhat unique to us, unless you're talking about somebody else who is also in a partnering, entitled-content type of situation, we were able to work through all that. I think, knowing more of what we were going to get into upfront probably would've helped us tackle those things a little bit earlier on in the process.

SI: Well, it seems like that brings us full circle to where we started our conversation before we hit record. And technology is great when it works.

JT: Yeah. Right.

SI: What else has come out of this or are there other kinds of wins and successes that you can share that have an outcropping?

JT: Yeah, definitely. One of the biggest things that was not really anticipated ahead of time, is it's just a great door opener for conversation amongst all of our different teams. We have a whole sales organization that's communicating with partners. We have a whole global partner marketing communication. We have regional stakeholders, we have product stakeholders. So this has really served as a great unifying conversation starter of how we can think about this in a holistic way, really kind of reaching out, building that awareness and how can we all kind of contribute to making it an easy success? You know, we can send emails out to build awareness for it, we can drive social campaigns, we can link and cross promote from our website, but we've really been engaging with our partner account managers and making sure that they're more aware of what these are.

So that's been great it's really kind of given us this shared goal, this shared concept that everybody is very bought into from that from a concept standpoint. And I think the other big win kind of as a byproduct is really around internal communications. So, you know, as a result of these news hubs, we've got a really easy place where our own account managers can go. So if they want to see what's the information that we're pushing out, that we're promoting to our different partners, they can easily access that themselves and it helps them stay more informed because just like our external partners, our internal sellers and account managers, you know they're very busy. They can't necessarily be bogged down with a lot of email too. So those have probably been the two most appreciated and unanticipated successes out of it.

SI: Yeah. Well, as you very well know, we always like to geek out on the tech around here and we've certainly talked about PathFactory. What else kind of came into play as part of this effort?

JT: Yeah, definitely Eloqua was critical, especially from the email standpoint, because we do offer a subscription option. We let them choose the cadence, do they want to get reminders on a biweekly basis or a monthly basis. And even though we might define them as a certain persona within our system, based upon the data points, we still open it up because you could have somebody who is set up to a tier-two smaller kind of partner. And we serve in both a marketing and a selling capacity. And so they want to get updated on both. So we didn't put any kind of limitations on things. We allowed them to subscribe, to updates, to whichever of the new hubs they were interested in. And Eloqua was really critical and helpful to allow us to do a lot of dynamisms in our emails. We're not sending them multiple for each of the news hubs, one similar dynamic experience.

And then the other one I would say most definitely was Tableau. Because PathFactory and Eloqua have a very tight integration, that's been super helpful. There's a lot of information in terms of activity that helps us make better decisions because it gets written back into Eloqua, but ultimately, we don't store our PII inside of Past Factory. And so, what we've been able to do is really kind of bring all that data out into our data warehouse and then we've been using Tableau to build some really awesome dashboards that are helping us get deeper, better insights into all of this data that we're collecting. So when we're analyzing things like binge rate and comparing it across different regions, when we're looking at that quarterly progression and how that's changed over time, and then we're filtering in all of our own proprietary information about our partners, it's really helped to open the door for us to make better decisions.

> *Tableau can help teams see and understand their data by connecting to almost any database, using drag and drop to create visualizations, and allowing you to share with a click.*

SI: That's fantastic. That really paints a nice picture and you know, there's nothing like having Tableau to give you a really nice visualization on the back end of it. So, what's next? Where do you guys go from here?

JT: From a news hub perspective, we're doing some UI enhancements to make it a little bit easier to filter and drill into the regional content. We're getting a lot of additional kind of onboarding from a regional communications perspective, looking at better ways to align different email communications like newsletters. How can we combine them together to bring some efficiencies there? We've also got a couple of localized

"...USING TABLEAU TO BUILD SOME REALLY AWESOME DASHBOARDS THAT ARE HELPING US GET DEEPER, **BETTER INSIGHTS INTO ALL OF THIS DATA THAT WE'RE COLLECTING."**

hubs. I think I mentioned one in simplified Chinese, one in Japanese, potentially one in Korean coming up. So when we have enough content, we're kind of bringing those in as well. But we have to, from a news hub perspective, again, it's looking at the metrics, looking at the data, how can we improve the content experience? We've made a few different changes, like our taxonomy for how we're tagging things so that we can continue to make it more intuitive.

And then in general for our team, really our huge focus area right now is on reporting. We just put together like a half a dozen different dashboards that can use Tableau and and we are really trying to bring together that multichannel view. We were doing pretty good reporting from an individual tool perspective, usually within the tools, but now we're really starting to blend those together so that we can get that overall view. So from web, from PathFactory, from Cvent, from Eloqua, from our marketing database, and all of our marketing tools, marketing velocity central, that has all of our marketing campaigns — how can you really start to see what the big picture is of what's the channels that specific partners engaged with the most, which ones are the most successful or the most successful kinds of programs and campaigns, and how can we use that to refine our strategy? So that's the big focus area for us right now.

SI: Great progression, Great project. Great, great win. Why don't we wrap up with just a couple of a little bit more personal questions, not too personal, but I'm always interested in what are the tools and apps just in your personal tech stack that you can't live without?

JT: Yeah. I mean, I'm just going to keep coming back one that I rely on so much. I have to say, you know, that PathFactory, Eloqua, Tableau they're just so great. They're so core and integral to what we're doing. Definitely, you know, loving chatbots and kind of the opportunities that they bring there to simplify the experience, especially from like a partner communication perspective, because, you know our digital team is amazing. They are constantly scoring so highly with the way that our search works on our website, the way that things are built to make it easy for our partners to locate things and find things. It's definitely a big challenge. But you know, a lot of that is very formulaic. So folding in those chatbots there to kind of help get people where they need to go. You know, those I think are just really cool and helpful, and people are definitely adopting those as kind of that first line of communication with always the opportunity for that hand raised to reach out to a human, if they need.

SI: There you go. Well, as you well know, we call the show inspired marketing and it's not complete until I ask you what it is that inspires you JoAnn.

JT: I would have to say that what inspires me is being given a really complex, difficult challenge that everyone has said can't be done and finding out a way to solve it. I just, that's what I really, really love to do. And it's never coming from me. It's, you know, how do we identify all the different people that can help it happen? How do we get everybody working together? What do we have to do from a change management standpoint, just really kind of tackling those big, difficult things and making progress and making things happen. That is what inspires me most. And that's what keeps me driven and going from a professional standpoint,

SI: That is very you JoAnn, thanks for taking some time with me today and, and inspiring us.

JT: Awesome. Thank you so much. Great speaking with you. Thanks.

"...TACKLING THOSE BIG, DIFFICULT THINGS AND MAKING PROGRESS AND MAKING THINGS HAPPEN. **THAT IS WHAT INSPIRES ME MOST."**

COVID PANEL

COMMUNICATING EFFECTIVELY IN HEALTHCARE

Ross Jacobs is the Account Executive of Healthcare Customer Experience at Oracle. He's been in the healthcare industry initially as a microbiologist working in the virology lab on vaccine research and development. Today, he leads the conversation with three healthcare providers and showcases how they've been communicating to both their staff and public on the latest COVID-19 updates.

Lauren Cislak is an executive director at Indiana University Health where she leads corporate communications, public relations and social media. She's been in the healthcare industry for 20 years and held similar communications positions at Eli Lilly, IceMiller and Zimmer-Biomet. Prior to healthcare, she worked in consumer packaged goods and with a large law firm. She is now serving as the public information officer (PIO) for IU Health's COVID-19 Incident Command team.

Dan Weaver heads up communications for UCHealth, which is a system of 12 hospitals, hundreds of outpatient clinics and more than 25,000 employees in Colorado, southern Wyoming and western Nebraska. UCHealth includes the state's only academic medical center, University of Colorado Hospital, and they have about 6,000 affiliated providers. Dan tries his best to never touch any kind of paid marketing, but he oversees corporate communications including earned media, owned media, internal and executive communications, events and patient communications. He's also been the system's public information officer over the past few months.

Craig Kartchner is AVP of Marketing and Customer Experience at HonorHealth in Scottsdale, Arizona. He leads marketing, digital strategies, advertising, and consumerism for the organization, focusing on mapping customers' healthcare journeys and replacing pain points with moments of delight. This involves working with all areas of the company to remove barriers to accessing care, and to make it easy and valuable for patients to engage in their own care. Craig also leads digital and web strategy, branding, customer research, content marketing, CRM strategy, analytics, and marketing automation efforts. Craig previously served as senior director of marketing at Intermountain Healthcare. He earned his bachelor's degree from BYU and his MBA from the University of Utah.

RELATIONSHIP ONE HOST, SCOTT INGRAM: Today in conjunction with Oracle CX Marketing we're bringing you a special COVID communications forum featuring three different healthcare organizations. Helping me co-host this conversation is Ross Jacobs.

ROSS JACOBS: Thank you, Scott.

One of the things I just wanted to touch on briefly before we let the speakers loose here is the purpose of today's forum. One of the things I think that is very interesting about this [pandemic] is that it has given us quite an opportunity to understand how we're communicating out, and the ability to do so at a very rapid pace. I have a quote from Sydney Harris, who's an author, a fairly well known journalist out of Chicago. It says "the two words, information and communication are often used interchangeably, but they signify quite different things. Information is giving out, communication is getting through." And that's really what this forum is about. How are you getting through to your employees, to the community, and to all of the patients. Right now our only concern isn't just COVID, but those things that are coming down the road and how we're going to evolve in the future with the constant threat of obviously viral infection. On top of that, some of the stuff like cancers, COPD, and diabetes become major things when people have been scared to go into the health systems.

With that, I'm going to go ahead and let Lauren talk and give us her 2 cents as well.

LAUREN CISLAK: Thank you. I think we're all going to have a lot in common in terms of approach to the pandemic. I thought I would just go through a couple of things that we did in Communications to address it. Most hospitals in the United States follow an emergency response practice called the Hospital Incident Command System (HCIS). It's designed by FEMA. It's very top down command and control, and it's pretty different from the way we work every day.

HICS is an incident management system based on pricinples of the Incident Command System, which assits hospitals and healthcare organizations in improving their emergency management planning, response, and recovery capabilities for planned and unplanned events.

We formulated our Incident Command team March 10th. People were pulled into officer positions that don't necessarily have the expertise in those particular areas, but fortunately I've always been the Public Information Officer. Since everything needs to be very process oriented - lots of forms to fill out, a very rigid schedule - it was hard for me to adapt because my team has always been very scrappy. We run like a newsroom. We don't know what every day is going to bring. We deliver. We work together very closely. So this process oriented, very rigid schedule of Incident Command - I fought it for a while, but finally gave in because I finally realized it was saving me. We were working so many hours, all day, seven days a week. We were delirious. We were tired. We didn't know what day it was and having this very rigid schedule actually helped us know what to do next and it kept us on track. The drills that we did really helped us when COVID hit us hard. Similarly when I was at a pharmaceutical company we had something called a Key Events team. So having these things set in place and being trained on them really helped us address COVID.

From a communication standpoint it was almost a dream come true because people actually wanted to get our newsletters. They wanted to get our emails. They were craving information versus before COVID we were always trying to make sure the content was going to resonate with the audience. We learned very quickly that people have a high demand for information.

We had four deliverables every single day that we communicated with leaders and team members. It started in the afternoon with the last Incident Command call of the day. We would publish the notes from that call. [I have resisted taking notes in meetings all my life because that's not what communicators do, but for this particular reason I recruited somebody to help me out. That's another tip, since my team was small and we needed to get the job done, I pulled somebody over from marketing to take notes in these Incident Command meetings.] We would publish those notes after the meeting, then we would do the leader memo. We would pull over important information for the leaders to have that evening so that they could cascade that down in the morning. After we published the leader memo we did a daily newsletter for all of our team members. It was very well responded to, lots of very good marks in terms of the cadence, they knew what to expect, they knew whatever information they wanted was going to come through these particular publications. In essence we developed this one source of truth.

The other advice, the thing that I realized after looking back, was that I had a strong team before I started, before COVID. We had a very collaborative team. Everybody had each other's back. A lot of them were friends outside of work. They would proactively support each other saying "I have some free time, does anybody need me to work on anything they're working on?" So we had a really strong team before, and when COVID hit they all rose to the occasion and they were incredible. It really challenged their skills and it was just a pleasure to be working with them. So if you ever needed to be motivated to take the time as a leader to build a strong team prior to a crisis, this was the perfect example. Take the time, know your team members, know what motivates them, get them cross-trained, because when a crisis comes along that's going to be hugely important.

> "TAKE THE TIME, KNOW YOUR TEAM MEMBERS, KNOW WHAT MOTIVATES THEM, GET THEM CROSS-TRAINED, BECAUSE **WHEN A CRISIS COMES ALONG THAT'S GOING TO BE HUGELY IMPORTANT.** "
>
> - LAUREN

The other thing that worked really well for us was transparency. We hear about transparency all the time. I would call ours "radical transparency". We knew that our team members were scared, especially the ones on the front line - were we going to protect them? They wanted to know how many team members were isolated. How many team members had tested positive? How many team members were back to work? Was there enough protective equipment for them? So the only way to do that was to just give it to them. We had a very robust DataBank with all this information in it. We pulled out the salient things that people were interested in. We put it on a dashboard that they could print out every day and post on boards so teams would know what the status is of the PPE and of their fellow teammates. As we all know, when you give 30,000 people some information it could potentially lead to the media. We figured that was going to happen, so we gave the same information to the media and said "here, we've got nothing to hide". Prior to COVID, we might have been a little bit more cautious, but this was really public health information and we thought team members should have it. We're willing to share with the media. I think the other hospital systems in the state were not happy with that, but we came out very straight forward with our ventilator situation, our ICU situation, and it really helped us build a relationship with the media. We wanted to show leadership with the community and be there for everybody and help the state try to mitigate the spread. Radical transparency - I think that'll be one thing that we carry forward in our practice.

Along with transparency we had to determine how to use our executives. Normally I am very protective of our CEO. I don't want him to do a video to endorse every single project in a corporation. So I'm very selective with what he participates in, but we decided that he was going to be the voice of assurance. We had a column from him every single day in the daily newsletter giving people a window into the executives - what they were deciding, why they were deciding, and what was happening. We also switched it up and one day a week we did a video with our CEO who is very authentic. We had him in IU Health logo wear and we put some notes in front of him. It was really raw and a little clunky, but he was really authentic. I think the team members really appreciated hearing directly from the CEO. I will rethink that strategy going forward as well. It was one of the things that I think really helped with team member engagement and that was important for us.

Every decision that we made had four goals: it was to mitigate the spread; enable the workforce and create a safe environment for them; be a trusted source of information; and be good stewards of scarce resources. We couldn't say that enough because people were nervous about PPE. We wanted to show leadership out in the community as well. As the PIO, I don't normally manage or lead a marketing or patient experience, but I ended up rallying all those troops together and we instituted more patient communication, more education to the public, and really pulled all the resources together again to show leadership out in the community.

I will stop there. I could go on – so many great experiences. I think the one thing that we're doing now is to look at what went well with the management of the pandemic and see what we can carry forward, and we can talk about more of that later.

RJ: Great. Thank you, Lauren. I'm going to go ahead and turn this over to Dan.

DAN WEAVER: Thanks so much. And thank you, Lauren. Knowing that Lauren was going to speak a little bit about the Incident Command Center I thought I'd try to take a slightly different approach and hit some of the key priorities that we focused on. Which frankly I think is probably very similar to lots of other hospitals and organizations.

I tried to map out a few of our bigger operational and staffing changes that we went through during our response to help make our response a little more feasible. Some of our priorities were focusing on our internal audience which includes physicians. We wanted to make sure that our employees, our providers were well informed about all of the changes. We had things changing every day, sometimes twice a day. It was certainly difficult to make sure everybody felt informed, felt like they had the tools and the information they needed, and knew what was going on. We also wanted to reduce some of the panic and the fear and be transparent with our employees and with our providers. We really tried to push the idea that with a focus on providing information, and by communicating with our employees and their providers, we can help reduce some of the panic and fear everybody was feeling.

We wanted to focus on the patient experience as well. To use our employees and to arm them with the tools they needed to be good ambassadors to our patients. In almost every large communication that we sent out we tried to bullet a few brief talking points for our employees and providers so that they could have those conversations with patients. We also encouraged them to go and talk to their patients, explain the changes and help answer their questions.

External audiences were also a big focus for us. We wanted to reduce panic and fear among the public, among our patients. We wanted to be seen as the region's experts and to increase trust and the overall regard the public has for us and our providers and what we do. Our external audiences include news outlets, legislators, board members, as well as local agencies, and our patients. As for our patients themselves, we had a lot of communication tactics that were directed directly toward them trying to help provide patients some of that expert advice.

January 19th was the first time we discussed Wu Han China and the Coronavirus and it was January 22nd when we turned on our first travel screening advisory and first started educating our staff about the virus. It feels like it's been both a really long time since January 22nd, but also it's been a whirlwind. Over that time we've had well over 50 All Staff - All Provider emails. Our CEO has had a weekly update - sometimes the update is just an email, sometimes it's a video. We've had 10 or 11 updates from our CEO out to All Staff - All Providers, including our non-employee physicians. We send out a lot of updates to community physicians, including those that don't even have privileges to work at UCHealth because in those early days we found that a lot of physicians were looking for the same expert advice, so we tacked them on to some of our broader distribution lists to make sure they were informed. We included updates to legislators and our clinical chairs at the university. We have had six virtual town halls to allow our leaders to present information to our employees and providers, answering their questions. This includes answering some of those difficult or negative questions that perhaps makes everybody a little bit nervous to answer. We've been trying to be as open and transparent as possible. We've been sharing information about the number of our employees who have tested positive, the number of our employees who have been out of work and who have now come back in to work. We've been sharing information about our PPE and masks supplies. Those seem like they're almost constant communications.

> "WE WANTED TO FOCUS ON THE PATIENT EXPERIENCE AS WELL. TO USE OUR EMPLOYEES AND TO **ARM THEM WITH THE TOOLS THEY NEEDED TO BE GOOD AMBASSADORS TO OUR PATIENTS."**
>
> - DAN

We also have an Owned Media team, which just like the Media Relations team is made up of former journalists. That team always writes informative, fact-based stories about health issues that we're looking at. They first started writing about Wu Han Coronavirus back in early February. They have expanded that a good bit. They have a newsletter that goes out to 700,000 people. That list includes large numbers of our patients, the public, it includes reporters, it includes local agencies, anyone who has signed up.

We've had a significant amount of news coverage as well. We've thought that it is a priority to continue sharing information and interviews with local news outlets. There've been times that UCHealth compared to all of our other competitors combined has had an overall share of voice for earned media upwards of 75%. With a 20 - 25% market share in Colorado, we're certainly seizing more than our fair share of the overall news coverage as we've really tried to push news outlets to interview and get accurate information out there to the public.

I'll mention quickly some of our key operational and staffing changes. Back in early February we stopped some of our communications work and had a few people dedicated solely to communications for COVID-19. By early March we were looking at our owned media and the UCHealth Today newsletter. We switched it from going out every other week to every week to those 700,000 people. We then began to dedicate every newsletter solely to COVID-19. By March we found that our communications team was a bit overwhelmed and we recognized that it was not sustainable. Also about that time, we stopped lots of our external marketing and advertising. In early March I pulled together our Chief Marketing Officer and our Vice President of Marketing and said we've got to reorganize the entire department. We have to pull all those people who ordinarily would have been working on marketing and advertising and reassign them over to various communications teams. We created a dedicated COVID Communications team. We had forms and a dedicated email box, and that process has worked really, really well. All of our communication, our individual teams, our Command Centers have had access to that team as well as the System Communications team. Its great to funnel information right into that team. Some of our copywriters and some of our designers who normally work on marketing and advertising things are now putting together signs for visitor restriction, they are writing some of our patient communications. We've got a very robust team there with all the resources that we need.

In mid March we stopped accepting visitors into our hospitals, but we wanted to make sure that we continue the connection with the news outlets. We wanted to continue making sure that we get positive and accurate information out to the public. We assigned two of our videographers who usually work on the advertising and marketing team to now work on the Earned Media and PR team. They became our internal news source. We created a new site on the website to provide this new UC Health news service. We shot interviews with our nurses, with our docs. We tried to be as open and transparent as possible, sharing some of our fears, our doctors and our nurses' fears, but also trying to share out a reassuring message that we do have the supplies that we need to keep everybody safe and to keep our patients safe. Those are some of the big shifts that we focused on. By the way, those new service stories they got picked up on - 88 separate hits on TV outlets, dozens and dozens of online stories, so the news outlets we found really had an appetite for some of the content that we were sharing out there.

Finally, I'll just mention our last sort of big shift that happened. At the beginning of May when we moved all of our messaging toward reassurance to our employees and to the public, messages about how we are keeping them safe, all of the additional steps that we've been taking to keep our employees, patients, and visitors safe. We've been pushing those messages out there for several weeks as we're looking toward the future now and trying to reactivate some of our services.

RJ: Just to add to this too, I think it's interesting having Lauren and Dan go first. They're heavy on the communication side whereas Craig is a Vice President of Marketing so it's a bit of a different angle. I'm very curious to hear what he has to say.

CRAIG KARTCHNER: I really appreciate what the two of you said, Dan and Lauren - that was interesting.

When we first started hearing about Coronavirus out of China, we focused our media response almost exclusively on crisis communications and on internal communications. We didn't start thinking about marketing for several weeks, even as the losses continued to mount. We were losing roughly $70 million or so month to month, and had somewhere around $300 million total in shortfalls. On the flip side, we went from 2% of our medical group visits being via video up to 53% in a matter of about a week. Literally it was within a week from 2% to 53% and it continued to climb after that.

Our initial focus was just trying to manage the insanity and get information out there as quickly as possible, but soon we were able to start thinking about operational changes and on improvements. The silver lining to this whole thing is how it's forced us to change culturally. It's forced us to consider a new path. Lauren, I really liked your radical transparency concept and I would say radical change, radical transformation - just being forced to consider new things. We know that necessity is the mother of invention and that definitely has prompted us to make changes which has been awesome.

Initially there was massive concern in our community, and among employees, about safety and about symptoms. What do I do if I have symptoms? Where can I get tested? Do we even have tests? We did a survey almost immediately of three groups: our physicians, our employees, and then the public to find out what they were most concerned about. If they would still consider coming back to a clinic or a hospital for what they needed. What they needed, not just in healthcare, but what were their greatest concerns and needs. Was it getting fresh fruit and vegetables? That they didn't want to go to the grocery store? Were they having a tough time getting toilet paper, whatever? We used the responses from those surveys to shape our communications. Some of the results were revealing. A lot of them were what you would imagine, but some people said that they wouldn't come back to the hospital even if their doctor indicated it was the only way to take care of what they had. Some people said that they didn't have trust in the EMT, ambulance workers and other emergency workers, that they felt like they wouldn't do what was best for them. So some things were a little head-scratcher, but those are the legitimate concerns.

We had an information blitz to try to help people understand about the disease, about our response, and what you could really contract COVID from and what you couldn't, and so on and so forth. The problem was that we didn't know that the scientific community didn't know much about COVID. We're trying to reassure people without all the knowledge, in order to do that it made it really a little difficult.

In response to the surveys, we launched a bunch of things. One, we had an employee resource page and eventually made it public. The public resource page is where people can find out about our food bank. We tripled the number of meals that were given at our food bank that HonorHealth owns and manages. We opened up grocery stands in our hospitals so people could buy [food] basically at cost. They can buy those essential elements; toilet paper, fruits and vegetables, and prepared meals and such. We offered free car cleaning, free hotel stays. Our own nurses and physicians didn't feel comfortable going home after a shift in the hospital so they could stay at a hotel. We offered literally hundreds of resources. Many community members were also offering discounts to their service that they provide so we wanted to pass that on to our employees and to people in the community so they would know what's available in the community.

> "THE SILVER LINING TO THIS WHOLE THING IS HOW IT'S FORCED US TO CHANGE CULTURALLY. **IT'S FORCED US TO CONSIDER A NEW PATH."**
>
> - CRAIG

One interesting thing was we found out it took a crisis of a viral pandemic for us in marketing to realize that we have light duty staff all the time. For example a surgical nurse or a surgical tech gets a cut that's not life threatening but they can no longer be in the OR. So we have this whole bevy of light duty staff that we can use for other purposes. We very quickly set up a symptom checker and a live chat capability for COVID and staffed it with the light duty workers. Eventually we were able to staff it with other nurses and such that were in areas that weren't as needed at the time. We saw a really big use immediately from that symptom checker and live chat. It's tapered off a little bit, but we still get very steady use of those tools.

We were also sending out communications a couple of times a week to our own employees. I was absolutely shocked to learn that wasn't enough. It's like what Lauren was saying: that you're very thrilled people actually wanted the newsletter and wanted communications. We couldn't communicate enough so we started doing daily huddles and updates. We started filming our senior leaders three times a week and sending out the videos. I thought it was complete overkill. I was the one of the naysayers, that it was absurd, this is too much, but it wasn't, people were eating it up. They just were panicked and wanted that reassuring voice and that reassuring information. So that's been very well received.

Moving into the present. I indicated that we had massive losses, everyone in healthcare has. They started about two or three weeks after the pandemic hit. We started thinking about marketing and how we were going to get those volumes back. We wanted to be very sensitive, even about elective procedures, so we started looking at differentiating factors among our competitors. We looked back at the survey to find out what people were most concerned about and then we looked at how we were ameliorating those concerns. One area that popped up is that we have robots that have very powerful UV light to disinfect rooms, disinfect really anything. We were using the robots to disinfect N95 masks and other PPE when our supply chain couldn't keep them in stock. We constructed a little booth and used those UV robots to disinfect wheelchairs and the PPE so that we could reuse them until the supply chain could catch up and get more in stock. We have pulled back heavily in our advertising and marketing as well, but we're the only local healthcare provider that has these UV robots. We've already received feedback in subsequent surveys that the robots are very well received by the public and they bring a lot of security to all of our hospitals.

We're doing some other things that I think everyone else is. We keep COVID positive people in separate areas of the hospital altogether. We're doing the temperature checks upon arrival and the daily self symptom questionnaires for staff. I think many people are doing that, but some of those differentiating points have been well received. We call our advertising campaign the "Every Measure Campaign". We have a landing page where we list all of the measures that we're taking to keep people safe. We've also started to see the elective procedures come back. We're up to perhaps 96% of our budget in May. We're hoping we can push even higher in our cath labs and endoscopy which are the areas that have been tougher to bring people back. We're actually worried from an oncology perspective. We're worried people are putting off care because of COVID and they're not getting screened. They're not getting treatment and it's going to cause problems down the road. So that's a major issue that we're worried about.

We found that our Physician Relationship Management team has been absolutely critical during this time. We have a lot of independent physicians because we're a mixed model. There have been a lot of communication issues with physicians, with independent physicians especially, so we have coordinated at an unprecedented level with our independent contracted position.

In terms of the future, I do believe we're going to have another spike and we're going to have more COVID cases. I think we're finding what new normal means for everyone, including healthcare. But I see a very bright future for healthcare, even brighter than before this pandemic because of what I said at the beginning that we have been forced to change culturally, in healthcare it has been so tough and it's blocked advancement, especially for customer experience type of things. This pandemic has forced us to continue to consider new technologies, new ways of doing things that I don't know we would have been able to do without a pandemic like video visits and telehealth. I don't think reimbursements are going back the way they were before. Demand from patients and physicians for those video visits are going to force us to have parity in reimbursement. I think the asynchronous health, tele-health like email and text, I think some of those modalities are going to become more and more a part of how we deliver care. People want it, they have seen the value, they've gotten over the fear and concern of getting into that technology. I think we're going to see that the adoption is going to be great for patients to access care and navigate care. So I see that as all very bright things for the future. I'm excited about it.

RJ: Fantastic. That was excellent, Craig. I think that Craig walked through that past/present/future state. It's really interesting. And I agree, I think that having been in healthcare for such a long time, that impetus to change has not always been there so I'm glad to see that you've seen that.

At this time I do want to circle back. Lauren, I'm sure that you may have a couple additional thoughts, same thing with you Dan. Feel free to ask some questions, I certainly have questions, but I'd like to hear each of you kind of ask each other.

DW: I'm curious about marketing automation, Craig. I'm guessing you're pushing out communications to your patients, the public. Do you have various groups? What are some of those messages and how's that working?

CK: We started communicating just what COVID looks like, what the symptoms are, what our testing locations are, procedures to follow once you believe you have it, or a loved one has it. Within a couple of weeks that started to shift and we added more elements about how to access other types of care not related to COVID. So if you have it, we were urging people to not put off screenings. If you have cancer and other chronic conditions do not put off care. Instead, access it safely using these channels (video visits and what other channels they could use). Eventually messages went back into elective procedures – when and how to get them back at the facility. We test everyone two days before their procedure, and if they do have COVID obviously we reschedule procedures and quarantine them. We have had a few of those cases out of the several hundred cases of the elective procedures we've done. So it's kind of gone from information on how to get care and make sure to not put off care, now to let's find a new normal and find a safe way to get back to elective stuff and to take care of your health and your family's health.

LC: I would love to dig deeper on the virtual healthcare part of it. We stood up our virtual screening clinic over a weekend so that we could screen team members and patients and then get them to the right places to get tested. That functionality just grew and grew and grew because team members could then call the screening clinic. If they needed to be screened, they could get tested. If they were a healthcare worker, we'd find them at a hotel. We have sleep labs in many places and we would put up our team members there. We're now working with Indiana University for their faculty and their students. So our virtual hub has grown, but our Chief Medical Officer says there is so much more we can be doing with the virtual visits.

I'm curious to see how else you are using virtual visits for more regular medical care?

DW: We started building our virtual health center a couple of years ago, offering virtual urgent care. Four or five months ago we were at the beginning stages of trying to get more clinics and specialty clinics, including primary care clinics online with virtual care. We had just started doing some of the post-surgery checkup appointments virtually. We were doing some primary care clinics, but it was taking awhile to be adopted. If we were seeing 20 or 30 virtual urgent cares in a day, that was a good day. Now this has totally exploded. In our virtual service we have conscripted new providers to go into our virtual care center. We have connected physicians and providers to be able to provide virtual services at home, or in their physical clinics. At one point in late April we were doing almost as many virtual clinic appointments as we were in person appointments. I've heard that our virtual urgent care appointments increased by 8,000%, so it was a huge increase. Over the course of about a week and a half, two weeks, we got more than 500 clinics, primary cares, specialty care clinics to go live on virtual care and virtual appointments. That never would have happened if we hadn't had this sort of burning platform to push it. That's been really positive for us. We don't think that it's ever going to stop here. Although, we're starting to see some of the trends for virtual appointments decrease a little bit over the last two to three weeks as our in person appointments have come back.

On the emergency side we've certainly seen that decrease significantly. At the very beginning of this we were telling people to avoid the emergency departments. "If you have symptoms, just stay home." Now our message is "please, if you need care come into the emergency departments". Maybe our messaging went a little bit too far in one direction. Our doctors in the emergency departments are seeing people postponing medical care that they need, sometimes coming in days later. They're seeing conditions that would have been relatively minor actually become far, far more severe. In response to this we've been pushing new messaging that says "if you have an urgent or an emergent medical need, whether you come into our urgent care, use our virtual urgent care, or come into an emergency room - we want to see you. Our locations are safe and it's important that you don't postpone the care that you need." Thankfully over the last week and a half we've seen the volumes pick up in our emergency departments.

RJ: I think that's a real interesting point and just looking forward to one of the things I wanted to hit on. I know it's not a quick question, or a quick answer. Looking at social determinants of health, and at the kind of audiences you are reaching out to, can you briefly speak to how you are planning to have the cancer patients or some of the diabetic patients who haven't been coming in when they should have. How do you specifically reach out to them? How are you going to target them and know who to really get in front of?

CK: The one thing that's worked really well for us is that we use all the channels that we have at our fingertips. We're emailing, we're using Epic My Chart messaging, but one thing that's been particularly effective is our call centers volumes have gone way down. Call centers are managed by marketing so we use that capacity to make those calls. Customarily we would allow the cancer clinics for instance, to do that directly in normal times. Now we have this capacity, because we were so worried about the screenings and making sure people were closing those care gaps and coming in, when they needed to, we diverted a lot of those calls to the call center. We have had enormous conversion rates. That sounds like a very marketing term, but we have people who are really happy to get those calls and schedule the appointments. We got really great feedback from that.

RJ: That's great because that directly translates into saving lives. When you look at it your communications and all of this outreach it sounds nice but really it's saving lives. Without them coming in to the doctors it could be a major health crisis for them as an individual, and a family community.

I know that Scott had something he wanted to add as well.

SI: I was really fascinated by the fact that all three of you mentioned that you either used your CEO or other executives as a face of a lot of your communications. Lauren, you said that maybe you had a change of heart a little bit around the way that you protected your CEO and maybe we should change the way you do that in the future. Can you speak to that in a little bit more in detail and how that thought process is evolving and the results that you saw from taking that type of an approach.

LC: Prior to COVID, as I said, I was protecting the CEO and what he was endorsing. I really wanted him to be the inspiration of the organization, to talk more strategy and vision and where we want to be, and not have him be the one to say "and next you're going to take this training and then you're going to get this survey". I didn't want him endorsing some of these logistical things.

Our CEO is very personable. He does really well one-on-one, that's his sweet spot when he does rounds versus these big presentations on stage. I protected him in that way. When the COVID situation started everyone said you need to have a message every day from Dennis (the CEO). I'm like, you are nuts but since it was sort of told to me I'm like all right, I'm going to go with this because I'm a team player. We're making decisions fast, and we've got to move on this. I recruited a writer and by delivering these messages every single day people got to know Dennis. He's a likable guy. The feedback about these short messages was incredible. It was the number one thing I heard the most about from a communication standpoint.

Today I got a request for Dennis to do a video on another project and I'm like just because we used him for all of COVID, more of Dennis may not be good. So now I'm going to have to backtrack a little bit. Dennis does not have to deliver every single message for every single initiative. I'm going to have to work through that, but I'm going to do it with a much more open mind. In the past I'd maybe try to go to the second tier of executives to get them recognized, but really be team members want to hear from the CEO.

theme. We had a financial theme. All the nuts and bolts were underneath it in a different story. So no, we were not delivering the nuts and bolts to the team members through Dennis. It really was "I want to be transparent. I want to be honest with you and let you know what's going on." It was a more emotional plea.

You also mentioned culture. We have been wanting to change the culture. We've been working on it for about four years and every year we add one more thing from a vision, to a promise, to values. We've set expectations that changing the culture is going to take 7 to 10 years. That has been the platform. I would say that during COVID-19 we have moved the culture to exactly where we want it and now we're trying to figure out how to capture this. How do we understand it and how do we

"THAT WILL BE THE CHALLENGE BEFORE US - TO **KEEP THE COMPASSION, THE TEAMWORK, THE QUICK DECISION MAKING, THE COLLABORATION,** THE NO HIDDEN AGENDA SORT OF THING. HOW DO WE MOVE ALL THAT IS POSITIVE STUFF GOING FORWARD."

- LAUREN

RJ: No, that makes sense. Anything else? Dan and Craig, any thoughts or comments kind of as we come to close here?

DW: I had a quick question for Lauren. I was curious - are you using your CEO for lots of those sorts of nuts and bolts change communications? Did you wrap them all up under that communication from your CEO? We ended up splitting ours, so we had a generic account for the COVID-19 updates to deliver the nuts and bolts, and then used our CEO to deliver the high level weekly updates. I was curious how you did it?

LC: Every day we had a newsletter and we would have the CEO message be more high level. There might have been a mental health theme. There might've been a PPE

move forward. It's fascinating to me how quickly we changed our culture, because we were all focused on one thing. That will be the challenge before us - to keep the compassion, the teamwork, the quick decision making, the collaboration, the no hidden agenda sort of thing. How do we move all that is positive stuff going forward.

SI: Lauren, thank you so much. Thank you all so much. This conversation has been absolutely fascinating. Ross, appreciate all the work that you did to pull this together. Craig, Dan - incredible contributions. Again, we're just really appreciative of your time and your insights and look forward to sharing.

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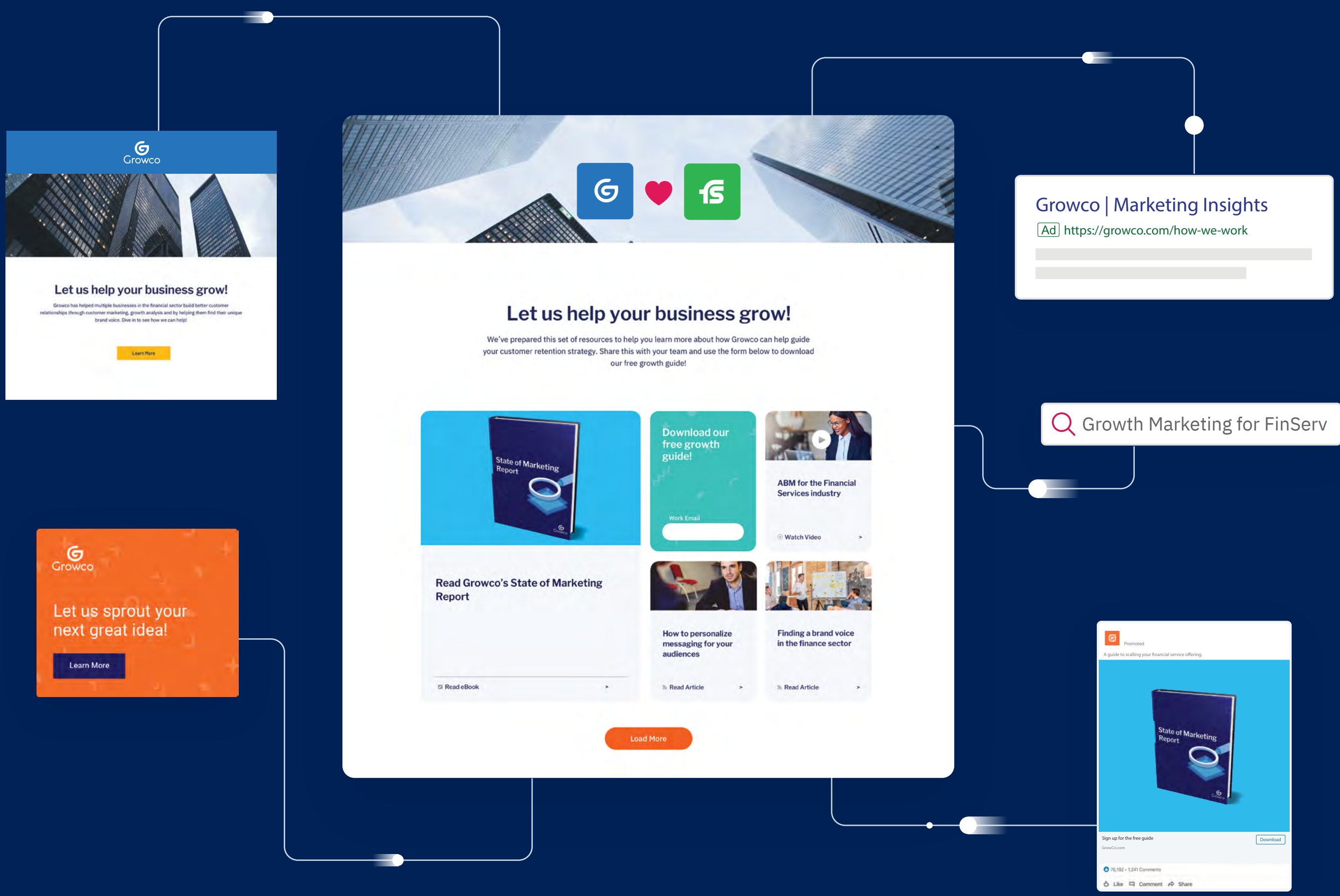

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GETTING THE MOST OUT OF RESPONSYS (AND B2C IN GENERAL)

AARON RITTER
RESPONSYS SERVICES MANAGER

When thinking about data and marketing within Oracle Responsys, it's important to remember what Responsys is and is not. Responsys is a high-powered, state-of-the-art marketing orchestration and distribution platform. What it is not, in any way, is a data management or customer lifecycle data platform. This means that it is not designed to function as an ETL environment, a long-term data warehouse for holistic data, or any other variation on that theme. With that in mind, there are some key areas we should always keep in mind when dealing with data in Responsys so that we can market efficiently and effectively.

DATA RETENTION STRATEGIES

Many marketers, wisely, maintain mountains of data on their customers. Where do they like to shop? How often do they shop? What do they like to purchase? What have they purchased? The catch-22 of this is that it becomes very difficult to decide what data is useful and what is not, especially when it comes to historical data. Sure, you know Aaron's shopping habits all the way back to 2002, but is that really helpful to us today? When it comes to historical data, determining what is and is not useful has to be a bit customized to the seller, but there are some good rules of thumb.

For interaction data (what are they clicking on, opening, etc...) A good guideline is to focus on data that's no older than 120-180 days. For things like purchase history, nothing beats a good RFM analysis, but failing that, keeping your focus as close as 90 days or more recent will allow for much better audience creation. If you're tracking where your customers are purchasing, ask yourself, do you need to communicate with folks about purchases older than 60 days? Of course, this will always be customized to your particular business, but for many B2C retailers, these are a good place to start.

Also consider how your business model can impact how you utilize purchase data for marketing. Does your business sell items that often need to be replaced or renewed? This could include anything from socks, to toiletries, to industrial strength adhesive. If so, why not monitor your customers buying habits, and encourage them to refill their inventory based on online activity and purchase history? Get the customer in the storefront before they even realize they need to be with a well crafted audience designed in Responsys. Not only will you reap the benefits, but your customers will be grateful they didn't run out of supplies at an inopportune time.

USING DATA FOR TARGETING

In a tool like Responsys, which has very few guard rails for what you put into it, it's important to keep an eye on what's actually "good" data. For Responsys, this means, what is data we can use to segment on or personalize to? We don't want to crowd up the account with things like one-time data or data we "totally might use one day, I swear!" For example, if I'm a clothing retailer, I know I want to keep track of things like purchase history, purchase channel, engagement history, product types and catalogue, etc… But, I might also want to be looking at a more granular level. For that, it might make sense to create a Profile Extension Table (PET) to track what specific product categories my customers purchase or to segment on what my customers are viewing on my website. If Lily is often viewing intimates, but not footwear, that's a targeted ad I can make just for her. On the other end of the spectrum, it's probably not at all useful for me to hold on to information from a sweepstakes or survey I ran 15 years ago. That data is almost certainly no longer relevant, and I'm not likely to ever use it in Responsys.

When you're dealing with a customer who has viewed a product multiple times, or a repeat visitor who views the product, changes options, compares and contrasts, etc., you can harness that information to trigger real-time communication. Even more, a proper Infinity and Responsys integration can generate customized messaging to engage that possible customer with content that speaks directly to them.

Abandoned cart data is another way to utilize your data for targeted messages that can lead to sales. Often, customers have every intent of completing their purchase, but are pulled away by one of life's many distractions. It never hurts to check in on that cart again. If items are still there, unpurchased, waiting to be sold, another gentle nudge (or two!) through a thoughtfully designed Responsys program can be all it takes to close a sale.

DATA HYGIENE

Last on our list of hot-button Responsys data topics is keeping your account clean. The first, and often not as obvious, task to really keep this in line is to maintain and update a commonly stored Data Dictionary document. This should really list out every table in your account, every column in every table the possible values for that column, and/or a brief description of the use for that data point. This document should not just be something done to keep the Project Managers happy. This should be a living breathing document of all the data on your account. A secondary benefit to this document is that it can help with hygiene by preventing unnecessary duplicate tables or data points from being created, as it should absolutely be referenced every time you create a new Profile List, PET, or Supplemental Data Table.

CUSTOMIZATION THROUGH CLEAN DATA

At the end of the day, your messaging and customer engagement should be tailored to your business needs to get the best content for your customers, but an almost universal truth of B2C business and for Responsys customers is that Remarketing is king when trying to drive revenue from customers already engaged on your ecomm storefront. In order to do this effectively, your data needs to be clean and well maintained. Every business is unique, and will need to create their own processes for data management. However, if you put in the time and effort, follow processes like the above, you'll see a myriad of benefits including but not limited to: better list creation and distribution time, faster Programs, better and more accurate personalization, and generally more sane marketers on your team! If this all seems daunting, remember, you're not alone, and the payoff will be worth it.

8 DO'S AND DON'TS OF EMAIL MARKETING DURING A CRISIS

KELLY SARDINO
CAMPAIGN SPECIALIST

Marketers are currently scrambling to decide how to email during a crisis. Should we send more? Should we send less? Can I email my entire database? These are all valid questions that many of us are trying to answer in these unprecedented times.

Relationship One is here to help. To make it easier for you, we have put together some Do's and Don'ts and gathered some helpful resources from others in the business to assist you as you navigate these uncharted waters.

1. DO ACKNOWLEDGE THE CURRENT SITUATION.

Inbox activity is up 27% according to World Data. People are opening and reading emails that acknowledge the current situation. They are at home checking their inbox and they want to read emails that provide tools, solutions, and value to them.

2. DON'T SEND COVID-19 EMAILS TO YOUR ENTIRE DATABASE.

COVID-19 messages are not transactional, so don't send them to everyone (especially those who have unsubscribed years ago). You risk spam complaints and future deliverability issues. Segmentation is key here; send the emails to only the audience that your message relates to. You should only be sending these emails if you have a legitimate business need to do so (such as providing information about event cancellations or how to access a company's remote services. This does not include emails about keeping your employees safe and things clean (shouldn't you always be doing this?).

3. DO REVIEW YOUR AUTOMATED EMAILS FOR TONE AND VALUE.

Be sure to audit all of your email programs, especially the automated ones (welcome, nurture, reminder, time is running out, last chance, etc.). Make sure they still make sense and are empathetic to the state of the world right now. Don't forget about the tone and content in imagery as well. Crowds of people and people shaking hands may not work in the current COVID-19 context.

4. DON'T CONTINUE WITH "BUSINESS AS USUAL."

Things are not the same as they were last month, last week, or even yesterday. Make sure that you have a plan and that your stakeholders are all on the same page. Re-evaluate your entire marketing program and make sure it still works. Continue to meet with your team on a regular basis to address situation changes and how they may affect your program.

5. DO LOOK AT WHAT OTHERS ARE DOING.

If you are worried about your messaging, or if you haven't sent out an email addressing the current crisis yet, it may be a good idea to learn from what others have already done. Check out some examples from Really Good Emails to see what other brands are saying.

6. DON'T STOP SENDING COMMUNICATION TO YOUR SUBSCRIBERS.

Your subscribers still want to hear from you. Figure out what your audience needs from you, and what unique benefit or service can you offer them. People are looking for value, escapism and the ability to be productive. If you are worried about sending promotional emails, onboarding emails, and monthly newsletters — just make sure they still make sense to send and tweak the copy if needed (remove the sentences about shaking hands and in-person meetings).

7. DO LOOK AT THE DATA.

Look at how your COVID-19 emails performed. If conversions are lower, you may have to adjust your tone, your message, or even re-evaluate what value your email is providing your recipient. Unsympathetic emails that miss the mark could alienate your long-time subscribers. If you don't feel like your email provides value or it just doesn't feel right to send, you probably shouldn't send it.

8. DON'T CAPITALIZE ON FEAR AND ANXIETY.

Don't send emails that try to profit off of the crisis or make people more anxious than they are already feeling. Acknowledge your recipients anxiety, but try to keep your message simple and calm. Make sure to avoid "Coronavirus Sales" or virus wellness packages.

Email marketing during a crisis is noisy and things are constantly changing. It can be confusing and difficult to keep up. Relationship One can partner with you during these challenging times to audit your marketing programs, assist with COVID-19-related communications, or help you navigate the challenges of a remote workplace and workforce.


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AWARENESS OR ACQUISITION – WHICH CAMPAIGN IS BEST FOR YOU?

MARISSA WASHINGTON
MARKETING CLOUD CONSULTANT

As consumers of products and services, we get inundated with all kinds of marketing emails. Some may seem irrelevant, while others are just what interest us. Behind every great marketing campaign is a purpose that is structurally aligned to the company's goal. A great marketing campaign is also well thought out and will coordinate back to your sales funnel. Emails we receive in our inbox should have a specific intent and should meet us where we are in the customer journey.

To better understand the types of emails we often receive, let's review the basic foundation and purpose of two types of campaigns. Marketers create and deploy all sorts of campaigns such as nurtures, reengagements, product launches, demo ads, and the list goes on. The core drive of these marketing campaigns is to generate demand and turn those prospects into customers. Therefore, most of these types of campaigns, if not all, can be classified into two types of campaigns: Brand Awareness and Acquisition. Let's talk more about each one so you can learn the impact they can have on your business.

BRAND AWARENESS

Brand awareness is a top of funnel campaign that is primarily focused on an increase in awareness and engagement of your company and brand. During this stage, the goal is not to sell the prospects anything, but rather satisfying their needs and wants and giving them the information they desire at that particular time. In addition to providing them relevant content, building a deep and meaningful relationship with them during this phase is critical. If you invest in the relationship now, when it comes time for your leads to take action and make a purchase, the likelihood that they will think of you will be greater. Fundamentally, these campaigns are intended to bring anonymous visitors to your website with the goal to convert them into a lead, likely through a form fill. The most common way to do this is by publishing content. They say content is king and that stands to be true for these campaigns. Content can be deployed via multiple channels to reach a wide pool of prospects. Some of these channels include blogs, whitepapers, social media, online ads and SEO marketing.

Again, the goal of brand awareness campaigns is to grab the attention of your target audience and convey to them that your product and/or services can provide value. You want your audience to think of you first when they are in need of your product/service. As a result of driving brand awareness and generating leads, you will likely start to see an increase in website traffic and social media growth. This is a great start in getting leads to push down your sales cycle.

ACQUISITION

Next, let's talk about acquisition campaigns. Contrary to the brand awareness campaigns that don't have much direct revenue tied to it, acquisition-based campaigns are all about the dollar signs. These campaigns are bottom of funnel campaigns that are designed to convert a lead into a customer by closing on a deal or opportunity. They are designed to move the needle to have an impact on sales. Some examples of call to actions in these campaigns are keyword phrases such as "buy now", "sign up now", and "click to order". To ensure you get the most out of these campaigns, make sure you are only deploying this campaign to leads that are already established and know your product/service well. The goal for this type of campaign is to increase sales. This can be anything from new subscribers, new sign ups, and of course, increased revenue.

When designing your campaign, it is important to have it align with your goals. For example, if your goal is to get a 25% increase in paid subscriptions, then the campaign should include multiple channels and easy access for your leads to conveniently find the "sign up now" button. Your brand awareness campaign should have educated your prospects, and now, it all comes down to performance of your acquisition campaign and whether your leads take action by completing a transaction.

I hope you now have a better idea about how these two types of campaigns work and how they complement each other. When done correctly, the brand awareness and acquisition campaigns seamlessly move your contacts through the customer journey. Now that you are more aware of these campaigns and the sales funnel, you can start to build actionable and measurable goals around the deployment of these campaigns. Take a moment to think about the areas of your business that need improvement. Whether it's lacking leads or needing to convert the leads you already have, there is a strategy for you.

AUDIENCE SEGMENTATION & TARGETING: LISTEN – DON'T ASK

MATT STRINGER
MARKETING CLOUD CONSULTANT

One of the most common challenges for any marketer is to identify and collect the right information to segment and target their audience. With good segmentation and targeting, marketers are able to attain the holy grail of "the right message, at the right time, to the right audience." Doing this well sets a foundation of success for any marketing campaign. If the audience isn't right, then the content won't drive engagement and conversion. What's even worse is that by segmenting and targeting poorly, you may cause your audience to question if they want to listen to your future messages and if they even want to receive them at all.

In trying to solve this challenge with my clients, it is not uncommon for one of the first suggestions to have customers and prospects tell what they are interested in. The group then proceeds to come up with ways to gather more and more information in hopes that their audience will provide it.

Surveys...

Preference Centers...

Event Registrations...

The list goes on....

As the marketing team brainstorms, their list of desired questions continues to grow...

Demographics...

Firmographics...

Geographic...

Preferences...

Interests...

Sub-interests...

Sub-sub-interests…

We-don't-even-know-how-to-categorize-it-but-we-still-want-more…

And so on…

By the end of the discussion, there's a list of dozens of desired pieces of information to collect. There are even more ideas around how to manage the user experience to ensure that the audience will not experience 'form fatigue,' and that the organization will have all the answers they want.

Does this sound familiar?

While on the surface, there is nothing wrong with this approach, but take a step back and consider your personal experience with some big name brands.

DOING IT RIGHT

Has Google ever sent you a survey regarding the ads it should display?

Have you ever needed to tell Amazon what types of products you are interested in?

Probably not.

The problem with asking is that it puts the responsibility and effort on the backs of your audience. Not only does this put the work on your audience, but it may also prevent you from gathering the desired information. Consider your average response rates and think about how many people will not respond at all.

By asking, it also tells your audience something else – that you aren't listening.

Think back to your experiences with Google or Amazon. How do they know what you are interested in?

It's easy – you told them, they listened. Every tracked action tells something about your audience.

Opening and clicking emails…

Visiting web pages…

Clicking ads….

Downloading white papers…

Searches on your site…

Shopping cart activity…

Behaviors and actions are more informative than any information your audience will voluntarily provide.

"But this sounds like a lot of work!"

This is one of the reasons why Google, Amazon and the like are the 'big players.' They did the work instead of asking their audience to do it for them. They listened to what their audience was already saying through their behavior and actions and then used that information to make it easy for their audience to be customers.

A PERSONAL EXAMPLE

My wife and I celebrated our anniversary recently, and I wanted to find something special to get for her online. I was opening more emails and clicking more ads than normal. As a 40-year-old male, the marketing targeted at me is pretty typical 'guy stuff,' but I was using the emails and ads as an easy way to get to the brands that I prefer for myself figuring they would also have something I could get for my wife.

Upon getting to these shopping sites, I would generally then navigate to areas of their store other than what I'd normally visit looking for ideas and inspiration. Within a matter of days, the marketing content presented to me had a noticeable change. The emails and ads for menswear, tech gadgets and tools were being replaced with content for bee- or honeycomb/hexagon-themed anything and gardening equipment.

Had I told these organizations that it was our anniversary? Did my wife have some super power to increase the likelihood of getting something she'd like?

No, I told them and they listened.

Within a few days, the perfect item appeared in a targeted ad from one of the sites, a silver honeycomb design necklace with a golden bee on it. Perfect!

Had these retailers relied only on what I had told them, I would have never found the necklace and they would have never made the sale. By listening to my actions and behavior, they heard that I was looking for something and they did the work to then tell me what they had that matched my behaviors.

BRINGING IT BACK TO YOUR BUSINESS

'Sure.' you may say, 'it's easy for Amazon or Google to do this,' but what about our business?

To do this well requires commitment to the strategy and then follow through to categorize and classify every trackable asset and interaction so that you can create a profile for every individual in your audience and across all platforms and channels. Just like at the start of this article, marketing will need to determine 'what' the information is that you need to know. From there, use your existing marketing tools to assign tags and labels to your content so that your audience can also be tagged and labeled when they interact with your content.

With each interaction, your audience will tell you more and more about their interests.

Are you listening yet?


Every Hour of
Every Day
We help businesses flourish with Oracle CX Marketing technology though a vast range of service offerings. Let us help you plan, build & succeed.
Learn more at relationshipone.com
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3 NURTURE CAMPAIGNS YOU (PROBABLY) DON'T HAVE, BUT NEED

KRISTIN CASILLAS
SENIOR MARKETING CLOUD CONSULTANT

Lead nurturing is a process of delivering relevant, timely and personalized content to your customers. At every stage in the customer lifecycle there are opportunities to build stronger relationships and position your company as a trusted partner. This leads to a positive impact on your bottom line—Research has shown that companies that excel at lead nurturing generate 50% more sales ready leads at a 33% lower cost.

You may already have some successful nurture campaigns in place, but here are a few you probably don't have, but need.

"WAKE UP" CAMPAIGNS

The purpose of wake up campaigns is to re-engage a dormant audience. The word re-engage implies that this audience was at one point active and engaged, but for whatever reason, they have faded away, and you're not sure if they're coming back or not. You may think you already have a "wake up" campaign in place, but take another look at your audience. Are you targeting all inactive contacts, or just the ones who have taken a break? The key here is that this audience has engaged in the past. Contacts with no activity have less potential and may even be a risk as there's a higher chance for spam traps and deliverability issues. The difference between these audiences is subtle, but important enough to treat them differently.

To find these users in your database, look for contacts who had activity in the past, anything from email clicks to purchases, but haven't done anything recently. The time periods you use to evaluate your audience will depend on your sales cycle as well as individual characteristics and behaviors of your target audience. Don't be afraid to play around with different time periods to find out what makes the most sense for your business.

This audience has potential, and with the right messaging, you can "wake them up" and bring them back to make a purchase. Try offering a promotion, announcing a new product or service, or just asking them straight up if they're still interested in your business. Once you feel confident about the messaging, you can use automation to trigger the campaign to begin at the exact moment a decrease in activity is detected, as well as move them into the next campaign once they've "woken up."

SALES ENABLEMENT CAMPAIGNS

There's a common misconception that marketers are all about generating leads, leads, leads. While generating leads for the sales team is an important role of marketing, the reality is that marketing is responsible for so much more and serves a multitude of audiences–both internal, like your buyers and customers, and external, like the Human Resources or Sales teams. Marketing is responsible for supporting the sales team not only by bringing in leads, but also by providing content and messaging guidelines to use in their communication to prospects and customers.

The purpose of a sales enablement campaign is to provide up to date and relevant content to your sales team that helps them close more deals. Include anything that your sales team would find valuable—from new eBooks, to competitive one-sheeters, to new Eloqua Engage email templates available to them. This will help your team members in sales close more deals and highlights marketing as a valued resource and partner.

To take your sales enablement nurture to the next level and enhance the experience for your sales team, go beyond email marketing and incorporate other tools from your martech. For example, use tools like Uberflip to create content streams that your sales team can review at their own pace, then send to prospects straight from their inbox. Another example is to create a Slack channel for the team to share updates real-time and collect feedback while avoiding cluttering up the inbox.

CLOSED-WON

You read that right. Everyone's doing a closed-lost nurture (and if you aren't, you should). But what about the deals you won? While 81% of brands have early-stage lead nurturing tactics in place only 29% are targeting their existing customers beyond the first purchase.* This audience could be your biggest opportunity—not only are they more likely than new leads to buy again, but you've most likely already invested lots of money and time to acquire them. Maximizing your return is critical.

There are a couple of different nurtures you can send to this audience depending on your company goals and business model. If you are a subscription-based company, it's important to continue to build a relationship and provide value so that when their subscription is charged each time, the thought of canceling doesn't exist. If you sell multiple products, there's an opportunity to upsell or cross-sell to this audience—they're already familiar with your brand and hopefully consider your company as a trusted partner. Lastly, consider reaching out to your happy closed-won customers to ask for referrals or testimonials. If they are happy with their purchase, they may already be acting as brand advocates and eager to help you out!

Whether you have nurture campaigns in place, or just getting started, remember to think outside the box. There are opportunities like these at every stage of the customer lifecycle, so go beyond your Welcome and closed-lost campaigns.

5 REASONS TO LOVE AN UNSUBSCRIBE

JEFF HARKNESS
SENIOR MARKETING
CLOUD CONSULTANT

As Marketers, we're constantly working to keep customers from unsubscribing. We closely monitor unsubscribe rates to look for trends over time. We look for every possible way to prevent them from happening, believing that the lower the number the better. But I'd like to propose the unconventional, if not radical, notions that when supported by a basic preference center, 1) unsubscribes are good, valuable and constructive actions and 2) unsubscribe options need to be more visible in the promotional emails we send.

1. MITIGATE RISK

One aspect of an unsubscribe that often is overlooked, is what it can prevent. While we hate to see subscribers leave, when an unsubscribe happens, it means the customer is far less likely to click a "This is Spam" button in their inbox that could result in a damaged deliverability rating and possible blacklisting.

Along those lines, an unsubscribe from a specific type of email via a preference center can prevent a contact from choosing a global unsubscribe option. This is often the very reason for having a preference center, but it's still helpful to keep in mind that a preference unsubscribe represents a contact that is still engaged and eligible to receive other communications.

2. IMPROVE YOUR NUMBERS

In most cases, as unsubscribes go up, so do overall open and click rates. When subscribers who were never engaged with your content leave, the needle tends to move in a more positive direction. This is simply an acknowledgement that, given a choice, a person who is not engaged with or invested in your content would choose not to receive it.

3. MAKE IT EASY

It is standard practice for email unsubscribe links to be placed at the bottom of the email, in small type, often in a color that's only slightly different than the email's background. Burying the link discourages clicking, but is that what we really want? The UX for this should ideally be treated the same as any other CTA placed in the email and be clear and easy to understand.

4. CONTROL THE PROCESS

Gmail, and other email service providers routinely provide their own system-generated unsubscribe link that's placed at the top of the email, often next to the Sender information. The Gmail links use the List-Unsubscribe header that many, but not all, email platforms include with each send. When clicked, the outcome can vary from an unsubscribe from similar emails, to a global unsubscribe from all emails from your organization.

There's nothing you can do to prevent this link from being present, but you can offer an alternative that leads to the outcome you want and highlights one of the reasons it's important to make the process easy and clear.

5. LEARN FROM IT

Consider offering an optional place for feedback in the unsubscribe process. This practice is becoming more and more common, but there are some pitfalls to be aware of and avoid. For starters, keep it short. No one is going to take time to choose from a dozen options. Instead, ask for the basics – was it you or was it us? In other words, try to determine if the unsubscribe is the result of something like the contact changing roles or if it's the content, frequency or some other aspect of the email that you could exert some control over. Over time it may help you identify trends you can get out in front of.

A customer who's decided they no longer wish to receive your emails is not inherently a bad thing. People switch roles within organizations, budgets and priorities change making emails that were once relevant, no longer valuable. Giving these contacts a simple, clear and intuitive way to exit can lead to positive outcomes. It can help ensure that other, more relevant messages continue to be delivered. It will leave contacts with a more positive impression of your organization and keep the door open for future engagement.

ARTIFICIAL INTELLIGENCE AND WHAT IT MEANS FOR EMAIL MARKETING

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Artificial intelligence (AI) has been pushing its way into the marketing scene for the past few years, using customer data and machine learning to anticipate customer needs and improve their experience. In email marketing, AI has the ability to remove a lot of guesswork, helping to create content and assets that speak to customers, delivering higher conversions, and increasing your ROI.

We all know how important personalization and optimization have become in email marketing. Customers are looking for partners who understand their needs, and that understanding has to come across in the emails we send to them. Personalization is only as good as the data you have. In order to use customer data in field merges, dynamic content, or for deployment send time, you would need to verify, or blindly trust, that the data is available, clean, and up to date. Sending email with bad data could wind up being more detrimental than not using the personalization at all.

By implementing AI tools, predictive analysis will, over time, clean up your customer data and put it to work in your campaigns. Below are some key components of AI and how they can be used to improve your email marketing.

MACHINE LEARNING

Machine learning is the use of AI where systems can learn from data collected over time, identifying patterns in customer behavior and delivering outcomes based on that behavior.

Timing: Knowing when to send email is a big pain point for marketers. We want our emails to hit inboxes at the time when customers are most likely to engage. Machine learning can be used for **send time optimization (STO)**, learning over time when each customer opens and clicks through your emails. Many email service providers and marketing automation tools are now offering STO out of the box, so that as you send email, the system will learn customer patterns and adjust when the email is delivered to them, automatically.

Segmentation: Identifying the best target audience for your campaigns can be challenging. AI has the ability to group your contacts by identifying behaviors within their digital footprint. By identifying customer interests, purchasing history, and personal data, delivering messaging that is timely and relevant will become more automated.

BIG DATA ANALYTICS

Big Data is "larger, more complex data sets, especially from new data sources" (Oracle, 2020) that are too large in their footprint to be able to analyze with traditional methods. Having data is great, but it has no value if it can't be used. By incorporating AI, marketers have the benefit of not only capturing these data points but automating the use of them to personalize their campaigns and messaging.

Subject lines and email content: A lot of time is spent on developing subject lines and email content that will resonate with customers so that they will open and engage with your messages. AI has the ability to remove the guesswork by using datapoints captured based on past interactions and personal information. This can be as simple as incorporating contact name or as complex as using industry or purchasing behavior to personalize a call-to-action through dynamic content.

Progressive Profiling: Form submissions have historically been one of the mainstays of data capture in marketing. It's an easy way for marketers to collect data straight from a customer with the hope that it will be accurate and help to increase their database and pipeline. The downfall is that, for the most part, humans do not enjoy filling out forms. The time involved and concern with privacy may increase drop-off and bad data (Mickey Mouse, anyone?). Progressive profiling is predictive analysis that will populate forms with different fields each time a contact will access your forms. This keeps the number of fields per form low while still increasing the data captured.

Contact Washing Machines: Progressive profiling will work hand-in-hand with contact washing machines that will help to keep your database clean so that it can be used. As contacts enter your database they should enter a CWM to make sure that data matches the criteria you've identified as standard in your system (2 character country codes, job functions, removal of 'celebrity' names, etc.).

Remember that machines are only as smart as the humans who work with them. It's important to stay on top of your programs and data by consistently reviewing and reporting and making changes to your campaigns based on those results.

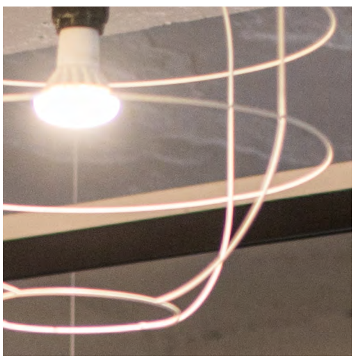
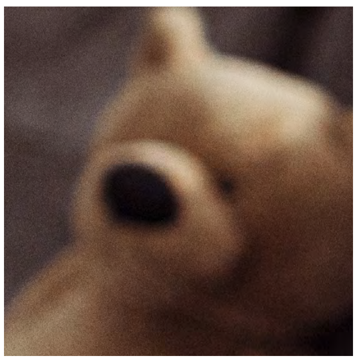
Citation: Oracle. (n.d.). What Is Big Data? Retrieved April 14, 2020.

BRAIN CANDY

CLOSE UP

It's important for modern marketers to have an eye for detail. How observant are you? See if you can identify where these zoomed-in images appear throughout the magazine. You're welcome to skim for a second time. ;)





ISPY

Let's see how observant you really are! Focus on the two photos below. Can you spot the 5 differences between the two images? Game on.

MAD LIBS FOR CONTENT MARKETERS

Find a fun colleague and take five minutes to fill in the blanks for an absurd, illuminating, surprising or just plain crazy take on content marketing. WARNING: this could get a little out of hand with a room full of creative marketing gurus.

In today's ____________________ [ADJECTIVE] digital landscape, content marketers must be sure to keep their ____________________ [BODY PART] on the pulse of the customer. Online, you have no more than a few seconds to grab ____________________ [PERSON IN ROOM]'s attention. So how can marketers keep the "fun factor" in mind when it comes to communications? First, think like your ____________________ [PLURAL NOUN] or ____________________ [PLURAL NOUN]. What are they____________________ [VERB ENDING IN "ING"]? What are their likes or dislikes? Once you have your ____________________ [ADJECTIVE] audience in mind, you can get to work on your messaging. There's no magic formula for going viral; rather, you can increase your chances of being seen by coming up with ____________________ [ADJECTIVE], ____________________ [ADJECTIVE] ideas that are cleverly packaged. Remember, Content is King but, with more than 53 million WordPress blogs online, what makes yours ____________________ [ADJECTIVE]? What are your ____________________ [PLURAL NOUN] writing about? Do your research! The key is to ____________________ [VERB] your prospects something new, introduce them to a new way of____________________ [VERB ENDING IN "ING"] or doing business, and provide content they can't wait to share with their colleagues. One way to ____________________ [VERB] the word is through social media platforms like ____________________ [BODY PART]-book and Twitter. Face-____________________ [NOUN] allows you to create a/an ____________________ [ADJECTIVE] profile, add other ____________________ [PLURAL NOUN] as friends, and exchange ____________________ [ADJECTIVE] messages. Twitter is a great way to stay in touch with clients and ____________________ [PLURAL NOUN] and share relevant content. But be careful not to ____________________ [VERB] content where it doesn't belong. Be ____________________ [ADJECTIVE] and judicious in this practice to avoid ending up in the____________________ [ADJECTIVE] box. These are just some suggestions for ____________________ [VERB ENDING IN "ING"] compelling content; above all, be sure to ____________________ [VERB] the right message to the right audience at the right time.

AUTUMN WARM UP

CHIPOTLE PUMPKIN BARLEY SOUP

INGREDIENTS

- 2 T Butter + 2 T Coconut Oil
- 1 Onion
- 1 Large Carrot
- 3 Cloves Garlic
- 1 Box + 1 Cup Chicken Bone Broth
- 14 oz Pumpkin Puree (not pumpkin pie mix)
- 3 C Cooked Chicken Sausage
- 1/2 C Barley
- 1/2 tsp. Cinnamon
- 1/4 tsp Ground Ginger
- 1/4 tsp Ground Cardamom
- 1/4 tsp Curry Powder
- 2-3 Tbs Honey
- 1-2 tsp Chipotles chopped very fine
- 1 C Greek Yogurt
- 1-2 Cans Coconut Milk
- Salt + Pepper to taste

INSTRUCTIONS

1. In a large dutch oven, saute the vegetables in the oil and butter until carrots are almost tender. After about 5 minutes, add in garlic, a dash of salt, and pepper.
2. Add in bone broth, pumpkin, barley, and all the spices. Cook at medium – high for about 40 minutes. Stir frequently to make sure nothing sticks to the bottom of your pot.
3. Add in chicken sausage and continue cooking an additional 10-20 minutes until barley is tender.
4. Whisk coconut milk and greek yogurt until no lumps remain. Add into the pot and continue heating until warm.
5. Taste and add in additional salt, pepper and honey as needed.

Note: The honey and coconut milk will help break the spice from the chipotles. Whatever you do, don't leave the chipotles out, because they add a delicious smokey flavor to the soup. Enjoy!

BRAIN CANDY

ANSWER KEYS

ISPY

a. Missing poster // b. Removed Stapler // c. Removed buttons on thermometer // d. Removed belt buckle // e. Change in chair color // f. Removed ring


CREATIVITY,
DRIVEN BY FLEXIBILITY
We've been developing private, custom apps for years, giving our clients exactly what they need for their specific journeys toward a modern marketing utopia. Apps built by Relationship One extend the reach and capabilities of the Oracle Marketing Cloud. The sky's the limit on connectivity.
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Eloqua Data Appenders
Data Cloud
DATA MANAGERS
Eloqua Data Appenders
Eloqua Inspectors
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CAMPAIGN ENHANCERS
Google Custom Audiences
Hootsuite for Eloqua
Twilio SMS Connector
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