

INSPIRED MARKETING

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At Relationship One, we empower organizations to modernize their marketing through strategy, technology and data. With a core staff of experienced marketing consultants, integration specialists, data analysts and development gurus, we have a well-respected track record for delivering solutions that meet our customers' 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



In my role, I have the privilege of talking about marketing tech and strategy with people who work at some of the largest brands in the world. Lately, I've noticed a trend. There seems to be an awakening to the notion that data and personalization need to be at the forefront of all marketing decisions. Delivering a personalized, tailored message to each individual is no longer a desire but a necessity.

Now, let me be clear, collecting and using data for personalization is not new. Organizations have been doing that for decades. What is new is that enterprise companies are realizing that they are sitting on a treasure chest of data that marketing teams can use to make key strategic decisions and improve the customer experience. The question is no longer "should we?" but rather "HOW?"

These are the types of conversations I love having, helping complex organizations recognize what data they have and developing strategies around using that data to transform their marketing and sales efforts.

One of the ways I can help organizations move in the right direction is to share the stories of others who are walking down the same path. No one has a monopoly on knowledge or best practices. We can always be learning. We can always discover something someone else has done and apply it to our situation. As John F. Kennedy famously said, "a rising tide lifts all boats." We all get better when we lean into the wisdom of others who are working on the same types of problems.

It's with that in mind that we want to continue sharing the stories of how our fantastic clients are using data and technology to deliver better results. Over a year and a half ago we started our podcast called Inspired Marketing to share these stories. And from there came a magazine by the same name.

Included in this magazine are digital marketing experts sharing about problems they've encountered and how they worked through them. And, given that Relationship One only works with clients who use Oracle Marketing Cloud products, all of these people utilize Oracle software as a key part of their solution.

WE ALL GET BETTER WHEN WE LEAN INTO THE WISDOM OF OTHERS WHO ARE WORKING ON THE SAME TYPES OF PROBLEMS.

Speaking of Oracle, we thought it would be fun to go straight to the source. We figured we should ask Jennifer Renaud, who heads the marketing effort for the Oracle Marketing Cloud, what problems she is trying to solve. What a better way to get the inside scoop than to go to the expert inside Oracle!

Jennifer was gracious enough to sit down with us and give us her thoughts. I am extremely thankful for her willingness to share her story and for the openness of the rest of our clients to also share theirs. I'm excited to share the wisdom and creativity each person featured in this magazine brings to solve enterprise-level problems. Be Inspired. Enjoy.



- COVER STORY -

ORACLE ON ORACLE:

Strategy | Tech | Change Management

IN THIS SPECIAL AND EXCLUSIVE INTERVIEW WITH RELATIONSHIP ONE, JENNIFER RENAUD—GLOBAL MARKETING LEAD FOR THE ORACLE MARKETING CLOUD—REVEALS HOW HER TEAM OVERHAULED THE WAY THAT OMC CREATES AND MANAGES ITS CONTENT. TODAY THESE EFFORTS ENABLE OMC TO TARGET PERSONAS WITH SPECIFIC PAIN POINTS IN SPECIFIC INDUSTRIES WITH THE PERFECT, HANDCRAFTED ASSET.

RELATIONSHIP ONE: Hopefully, everyone is already intimately familiar with the Oracle Marketing Cloud, since that's our entire focus with this magazine. So, why don't you just tell us a little bit more about yourself and your role?

JENNIFER RENAUD: I am a Modern Marketer. That's what I do. My job is to be the first and best customer of the Oracle Marketing Cloud products, so I get to use them all, test them all, try them all—work with our partners and make sure that we are discovering what really works in the product set.

R1: In the last few years, we've heard a lot about content marketing. I know this is something your team has really started to press into. Can you talk more about where this particular project started? What was the impetus?

JENNIFER: What really got us going was thinking about better ways we could develop and manage our content. But it wasn't just how we managed our content. At the beginning we started with knowing we had to go through a global rebranding exercise.

So, at that time we said, "Let's look at all the content that we have, because it's going to cost us money to move everything to the new brand." And after we looked at all of the content, we looked at what had been used for campaigns, what had been successfully used in campaigns, what drove

the right engagement with our properties—we ultimately decided we probably needed about a fraction of what we currently had.

The Pareto principle works: the 80-20 rule. We probably had about 20% of what we really needed, and with that we said, "Let's rethink how we're managing this. Lightbulb, on: We already have a product that does this that we are barely using." I started exploring how our marketing team could put Oracle Content Marketing to use.

R1: That's exciting. Are you far enough into this project that there are results? Are you seeing an impact yet?

JENNIFER: Not yet. We're just getting started. But I know if I had said, "Let's move everything we have to the new brand," we would've spent a lot of time and money doing that. So I think for us, simply being able to begin the process and do the requirements analysis and think about what we really need—that's a good result already, because we've already saved money in our budget during this new fiscal year.

It was also good for us to rethink how we develop and manage our content, because that will lead to us figuring out how we can make better use of our investments and our time. And to take it even further, this project will also help us focus on and reexamine how well we manage our messaging.

Overall, the whole project is presenting us with a great opportunity to get even better.

It's also a great reminder to everyone: you have to start with a plan. Even an organization like Oracle needs to keep this in mind. Just because we have access to the best tools in the marketplace, doesn't mean we will use them if we don't have a well-thought-out plan. In our case, we had a problem and we came up with a plan for how to assess our content needs, how to manage a massive rebranding initiative and how we could go about managing all the moving parts. Fortunately, we were able to use some Oracle technology to solve our problem and help execute against our plan.

R1: Great. Can we get an even more macroscopic view of the project, if you don't mind? I'm sure Modern Marketers out there are wondering: How did this project start?

JENNIFER: It started with a completely different project, to be honest. That project became the rebranding exercise, and that shift is what motivated us to rethink how we were going to manage what we did, moving forward. That started it.

Part two was doing a persona review at the same time. And while we were doing a persona review, we asked ourselves, "Hey, how much content do we have matching each persona?" Today, given the way we create content and manage it, I'm not able to tell you. But knowing how the analytics work in content marketing, soon we'll be able to answer that question definitively and say, "We've got the right content created for the right personas, and the right industries, and the right product set."

There are a lot of ways for us to be able to look at this and know we've really covered our bases and we have what we need to drive the types of campaigns that we are driving.

R1: You were just gesticulating and drawing a grid in the air for me as you explained that. For those who maybe aren't as familiar with Oracle Content Marketing, can you tell us why you were framing it that way? Because I think it's a really, really valuable tool in understanding this content map, this landscape that you're trying to solve for.

JENNIFER: The thing that lit me up when I was looking at a demo of [Oracle Content Marketing] was being able to "tag" a content piece or an asset as being about a certain topic. That enabled us to say, "This is a particular topic—let's say, Oracle Eloqua—and this is a tagged thought leadership piece about it." And a thought leadership piece would actually take it a step further, since [thought leadership] is also for enterprise. So in that case,

I could actually tag that asset again and say, "This content covers these industries. And as for personas, it covers this buyer."

Let's say the value proposition we need is: "This is a CMO in a financial services company that needs x information about Eloqua." I now have the ability to create content based on that. I can build out my map in advance and know I want to cover these personas, these industries, these six or seven content types, and I can understand what my topics are.

Topics for us will probably be each [OMC] product, and that makes it a lot easier for us to make sure that we are covering completely how I would go to market in any area. So, if I wanted to do a campaign [again using a CMO as an example], I would be able to look at everything I have available, tag for the CMO, and make a decision around if I have everything I need today or if I have a gap that has to be filled by creating something. That totally changes how we build a campaign.

R1: What are the most important steps and decisions you've made during this project?

JENNIFER: Doing the full-on requirements analysis, and making sure we understand all of the inputs and outputs and who all of the users are. The inputs are, "Who are our content writers? Who are the people who are creating content?"

And for us, it's not just a few writers on the team. This involves crowdsourcing that we're going to do across Oracle, which will allow us to create meaningful content by the experts we have everywhere in the business. We have experts in customer success, in services—on our marketing team and in our sales organization. We should be leveraging them to be able to share what they know about using and deploying any one of our products.

On the other side of it, we have sellers who need access to this content, as well. There's a great portal in this [project] that will allow us to tag content that's really meant for them, so they can go ahead and share that content with customers in an effective manner.

And of course, how we can build content and publish it in many different locations is great, as well. We have content blocks for which we can say, "Hey, use this any time you're publishing to the web or have templates that allow us to do that." That changes how we create the content—how we build it, use it, and publish it.

R1: Just to reemphasize your point on the crowdsourcing of content: There are amazing conversations [being had] when sales answers

customers' questions, and those questions and answers can lead to amazing content, right?

JENNIFER: Yes.

R1: But all too often, that content is one-time or one-off, I think, never to see the light of day again after its initial use?

JENNIFER: Exactly. And then you've lost that institutional knowledge.

R1: Right. And at this stage, what's been the hardest part? What have you overcome? What challenges are you still having to plan for?

JENNIFER: This might be hard to believe but it's the technology adoption. It's building the integrations that we need in order to build with

our own technology. Even though it's ours and we use it, we still have integrations that we have to build for ourselves. It's also been making sure we have the right integrations with some of our partners—like CloudWords, who was helping us with our translations. It turns out CloudWords has a great integration and it accomplishes what we need it to accomplish, but not all integrations are that seamless.

R1: And this is a universal thing, right? It's something you have to think about for every technology project: change management, adoption, and integration. Because there is so much more to it than, "I'm going to wave a magic wand because it's SaaS software and I've got my license and we're ready to go." No, there's more to it than that.

JENNIFER: Absolutely.



R1: So, I just love hearing how you guys thought through the bigger picture, so that further down the line you wouldn't have to say, "Hey, I know we're a year into this but I guess we have to restart." You provided sponsorship and guidance and addressed [the common challenges] upfront.

JENNIFER: Right. And it's really unique when you own the product, because it's the one you sell. That adds a unique twist to it, as well.

R1: I know what you mean. At Relationship One, we try to help facilitate with many of our clients and take what they're trying to do and improve the solution-based on their unique use cases, the ways they're trying to use these products, the challenges they're trying to solve for. It sounds like you're going to be doing the exact same thing?

JENNIFER: Yes, we're doing the exact same thing. And we're actually doing it with fantastic partners just like Relationship One, so we also get the benefit of the work they've been doing with a number of our customers. There's no reason we should invent everything entirely on our own. We want the same experiences that our customers have: to work with and learn from companies that we trust. R1 is one of those companies.

And actually, it was during a sales call with a customer on this very topic that I first realized, "Wait, we have this tool, and I don't think we're using it anywhere near the capacity that this salesperson describing it to this customer." That's when I went back and said, "Wow, guys. Are we really using this in every way we should?" I knew a few people in the organization did, but I didn't realize the extent to which we could be using it and how it could transform our business.

R1: Fantastic. What's next? Maybe not "next"—it's not like you're single-threaded in the work that you're doing, since there are probably many other things going on! I should say: What else are you most excited about right now?

JENNIFER: We're looking at the roadmap of what's coming out with Oracle Eloqua. We recently announced a connection between Eloqua and Outlook. We are very excited about being able to deploy that with our sellers, so that we can give them the opportunity to just to be able to press "Send" in Outlook and create better engagement with our content that way. I'm excited about continuing the journey we're on: looking for better ways to use our technology by being the first and best customer for our own products.

R1: Good, good stuff. You and I should have more regular conversations, because this Oracle-on-Oracle innovation is not only top-notch but also

necessary. With the way you're using OMC's solutions, you look an awful lot like many of your customers.

JENNIFER: I love when our customers ask us about this. I do get asked that question pretty often: "Do you use your products?" Yes, we do, but sometimes not to the capacity that we could. In that case, our job is to figure out how to get the most out of it, so that's what we push for.

R1: Jen, we don't get to finish this interview until we ask this question: What is it that inspires you?

JENNIFER: I'd love to answer this question with a quick story. This weekend I was watching a marathon of the HGTV show "Fixer Upper," and I was so inspired by what they were doing on the homes to create something that was less than perfect but still beautiful. I really thought about that, because I like trying to figure out how to make things a little bit better. I like to ask the question, "How can we do this a little differently? Are we doing this in the best way possible?" Whether it's a home or the processes you have at work, I think there's value in imagining what you can do to make something more functional and still impressive, even if it's not perfect.

Can we manage content more successfully? Are we managing it in the best way? Is there anything we can do to enhance this process? We spent a lot of time asking those questions. So for me, I'm inspired by finding that little bit [that can] make things more efficient and cost-effective by answering the question, "What can we do to make it better?" ☺





STORIES OF MARKETING INSPIRATION:

REALIZING SUCCESS WITH THE ORACLE MARKETING CLOUD.

Digital marketing can be tough to master but, once you do, the payoff is remarkable. With dedication and marketing-savvy, you can give your customers the individualized, multi-channel experience that they not only expect, but demand.

We sat down with some industry leaders to share their real experiences of how they've transformed their organizations marketing while using the Oracle Marketing Cloud. These stories are meant to fuel your inspiration, drive you to excellence, and teach you more about how your peers are using the Oracle Marketing Cloud.

Grab a cup of coffee, put your feet up, and gain some digital marketing inspiration by learning about the work being done at Tableau Software, Mouser Electronics, Polycom, Wiley Education Services, and the Chicago Bears.



ORACLE + THE CHICAGO BEARS CUSTOMER EXPERIENCE

At Oracle it's called "the power of advocacy"—the ability to craft compelling and emotionally resonant experiences that speak to the individual customer, not to a crowd. It's a new classic in the B2C playbook. Why? Because only by personally engaging people through the whole funnel can companies convert leads into buyers, and buyers into loyal brand evangelists. But a good customer experience isn't built overnight. It takes clean data, smart testing, cross-channel planning, and cross-team alignment.



Elaine Delos Reyes
DIRECTOR OF MARKETING
CHICAGO BEARS

ELAINE DELOS REYES - DIRECTOR OF MARKETING WITH THE CHICAGO BEARS—REVEALS HOW ONE OF THE OLDEST SPORTS FRANCHISES IN THE U.S. USES POWERFUL NEW TOOLS TO BUILD ENGAGING CUSTOMER EXPERIENCES AND ENERGIZE THEIR FAN BASE.

BACKGROUND

RELATIONSHIP ONE: Elaine, it's a pleasure to speak with you. Could we start with your providing some perspective? How do you think about marketing in the NFL knowing that your team, the Chicago Bears, has sold out every home game for the last 31 years?

ELAINE: I would say the word "marketing" can be interpreted in many different ways. Organizational goals really keep the Bears' brand relevant and ensure we're continuing to grow and nurture the fan pipeline. Fan engagement in the NFL goes beyond the 10 games we have each season [two home preseason games and eight home regular season games].

R1: How so? I think for the average football fan, watching that handful of televised games can feel like the alpha and the omega of "being a fan," so to speak.

ELAINE: It's about really engaging with fans and having touchpoints 365 days a year - touchpoints that are meaningful, exciting, and authentic. We really want to make that emotional connection with our fans. We had the Miller Lite Draft Party on April 28 [on the first day of the 2017 NFL Draft]. We had the PNT Bears 5k at the end of the June. And then there's training camp every July and August, which is free and open to the public. We also have a Ladies' Night coming up in October.

But in addition to events, we also engage our fans through social networks and digital and broadcast content. For example, we produce "Inside the Bears" which is a television show that works as digital content we can run throughout the calendar year. There is also our Bears mobile app [where users can follow roster moves, watch live press conferences, and more].

Keep in mind: For us, fan engagement is not one-size-fits-all. It's about paying special attention to growing engagement with our young, female, and multicultural fans. It's about hitting fans whom some may call "out of market." We never want to take the fact our stadium is always sold out for granted. We want to make sure our fans know we value and appreciate them every day.

CHALLENGE

R1: Given the wild success of attendance rates at Bears home games, how do you define marketing success? Or would it be better to ask, "How are you measuring engagement?" As we alluded to before, it's not like you're hurting to sell more seats!

ELAINE: One of the main reasons we decided to start using the Oracle Eloqua platform was that we wanted to strengthen the relationships between the team and our season ticketholders, fans, corporate partners, and key stakeholders. We wanted the communication to be personalized, targeted for them—not just a means to sales lead generation. We wanted to make sure we were nurturing and providing value.

With that in mind, different metrics and KPIs can be used to define marketing success. Some examples [of success] would be if people bought tickets to Bears events other than for games, or if a certain number of people participated in our event surveys (we do 20 to 30 a year). It could be seeing growth in our database, growth in the number of engaged users we have on social. It could be unique opens, websites views, clickthrough rates, and retail sales.

But to really narrow it down, it's all about engagement and making memories for our fans. Any way we can amplify the Bears brand and make sure our fans know we value them is a win. We'd consider that a successful marketing and engagement piece.

SOLUTION

R1: And how has your work with Oracle Eloqua and the Oracle Marketing Cloud impacted those metrics and your ability to achieve them?

ELAINE: Oracle Eloqua has helped us make an impact on these goals in various ways. During our first year

"ONE OF THE MAIN REASONS WE DECIDED TO START USING THE ORACLE ELOQUA PLATFORM WAS THAT WE WANTED TO STRENGTHEN THE RELATIONSHIPS BETWEEN THE TEAM AND OUR SEASON TICKETHOLDERS, FANS, CORPORATE PARTNERS, AND KEY STAKEHOLDERS."

with Eloqua, we saw an immediate impact on the Bears organization. Prior to the implementation, each department was sending its own message through different systems. Oracle Eloqua really motivated us to think strategically as a whole about tailoring and targeting our messages to our fans.

We developed an email marketing calendar and started having weekly meetings with different departments and partners, so we could have an integrated communication plan and so our emails would have a consistent voice and look.

R1: After that inaugural year with Oracle Eloqua, how did the marketing team move forward? How did the Bears' marketing team keep building based on what had been learned or discovered?



ELAINE: In our second year with the platform, the focus was on cleaning and appending data where applicable. Since we had more data sources and were integrated into Oracle Eloqua, we wanted to make sure everything was standardized. So, we developed programs that ensured when new contacts were uploaded, the data would be cleaned and formatted correctly. After that we created programs that would append additional information based on the data we already had.

For example, since we were collecting zip codes on our sign-up page, we created a program that would [automatically] append the city and state [someone lived in based on the zip code they entered]. This made it easier for both us and the fans to see who lived 75 miles within our stadium, practice facility, and training camp.

That same year we also integrated with the Chicago Bears' Pro Shop, which is technically a third-party vendor for us. There were some hiccups along the way; for example, the Pro Shop's preference center didn't mirror the same kind of information we were collecting from the Bears' preference center. But with a lot of collaboration we were able to work through it.

RESULTS

R1: What outcomes emerged from this collaboration—from the Bears' marketing team working together with the team's Pro Shop to standardize data?

ELAINE: We decreased the Pro Shop's database by 53% during the process. That was definitely very scary as a marketer. But we shouldn't be afraid of cleaning our contacts or even deleting them if they're bouncebacks or inactives.

R1: Aside from increasing the strength and health of your database and contact records, what other results did you actualize?

ELAINE: When we did our year-over-year analysis, we saw we'd experienced a 75% increase in gross sales and a 53% increase in the number of orders. Since we aligned with the Pro Shop back in 2013, our unique open rates have increased by 91% and our unique clickthrough rates have increased by 70% for Pro Shop emails. Additionally, the percentage of revenue we generated from emails has increased by 111%. This really shows us that our fans are valuing the communication they're getting from us now.

R1: Those are fantastic numbers! It's so encouraging when a program yields outcomes like that. Can I ask if you've observed anything qualitatively, as well—beyond the metrics?

ELAINE: Sure. Last year, when we focused on building out integration with the Bears' Pro Shop, we realized it's one of the areas of our business with uncapped revenue potential. We helped the Pro Shop with

branding strategy for their communications and enabled consistent use of Bears colors—blue and orange—and marketing phrases, like "Make every day Bears blue and orange." We were also able to launch a Bears email campaign that sends fans to the Pro Shop within 24 hours of the Bears' winning a game, so we can ride that emotion and celebrate together.

The biggest impact [internally] was the collaboration between different departments and developing an integrated communication strategy. Before Oracle Eloqua, we had lived in a world where there were a lot of silos around fan communications. Breaking those barriers down was really important for us. We were able to strategize on what communication was most valuable and when it was best to send. From there, it was easy to see the effect on goals and metrics.

R1: And en route to your achieving those goals and meeting those metrics, what were some challenges you encountered? Eloqua is a powerful tool, but integration can be tricky for any organization.

ELAINE: We've overcome some challenges, yes. There are challenges anytime you work with [marketing technology] platforms, because the technology is always changing and it can change rapidly.

I mentioned this earlier, but the Bears Pro Shop, for example: It was collecting really basic information, and we had to try to mirror that data to our own preference center. The Pro Shop only collected names and email address, and even then I don't think they had a separate field for first name and last name—so it was also quite messy.

R1: As a marketer, I'm getting nervous just hearing this story! How were you able to fix this?

ELAINE: First we had to collect all of the Pro Shop information and append the current subscribers' purchasing data. Then, we put together a preference center that we could iframe onto the Pro Shop's sites, so we both could have a similar type of preference center. After that we did a manager preferences email

"ELOQUA REALLY MOTIVATED US TO THINK STRATEGICALLY AS A WHOLE ABOUT TAILORING AND TARGETING OUR MESSAGES TO OUR FANS."

campaign specifically for that group [of contacts], so we could get their data cleaned up.

FUTURE

R1: After overcoming these challenges, the Bears' marketing team must be excited and encouraged going forward. What lies ahead? Are there upcoming projects that you and the team can't wait to tackle—pardon the pun?

ELAINE: We do have an opportunity for improvement as it relates to CRM. There are several departments that are not integrated with their CRM system. That limits our ability to use automation in the best way possible, since we don't have that connection yet with Eloqua and CRM.

That means we're still heavily relying on uploading lists to manage certain email campaigns. But since we want to avoid ineffective or duplicative communication as much as possible, we understand eventually there needs to be more conversation and action around connecting the dots between CRM and a larger data hub for the Bears. That's how we can really, truly maximize the Oracle Marketing Cloud.

R1: Earlier you spoke about the importance of fan engagement—about not taking the amazing fans for granted who've helped make the Bears a successful, profitable franchise. Are there any new ideas coming on that front?

ELAINE: Well, hopefully the next big thing we'll be talking about next year is the playoffs! But really, every new season brings a lot of excitement. Next on the list would be connecting CRM to concession, merchandise, digital behavior, and obviously the Oracle Marketing Cloud. This statement has been widely overused, but we mean it: We want that true 360-degree view of our customers, so we can serve them better. That would include more customized communication and an improved gameday experience.

Some other to-do's would include better leveraging social media and real-time actionable data, so we can see how that plays into the larger data picture.

R1: What advice would you give to marketers who seek to meaningfully engage their contacts? Have you learned anything in your journey with Oracle Eloqua that particularly sticks with you?

ELAINE: My biggest piece of advice would be to be patient. Start with quick and impactful wins to show progress. Think about the low-hanging fruit. This [mindset] is why one of the first things we did was an automated birthday campaign. Obviously,

that's not revolutionary; lots of brands do that. But the current campaign sends emails to people on their birthday and also sends belated emails three days later if they haven't opened [the first send], and the birthday email has an offer in it for 35% off in the Bears' Pro Shop with free shipping. That campaign's done really well for us.

R1: How so?

ELAINE: It's generated over half a million dollars in gross revenue. We actually had a fan write to us and say, and I quote: "Wow, you guys are the first ones to wish me 'Happy Birthday!' I know it's set up by a computer but it means a lot. Thank you, and go Bears!" This person knew exactly what was going on, that it was automated, but they still appreciated that we remembered them on a special day. So, this is a simple campaign—low-hanging fruit—but it's provided ROI for the organization through merchandise sales, because the campaign was personalized.

R1: And what about beyond the Bears—what about you as a marketer, as someone who builds campaigns and strategizes touchpoints? What's that one thing you can't live without in your role?

ELAINE: Like many people, I can't live without my iPhone. I'm not that much different from the larger population that uses mobile for everything from paying bills to shopping. But as a marketer, I find myself evaluating mobile ads and consumer experiences for myself. I take lots of notes when I put myself in the shoes of a consumer, so we can better promote Bears initiatives to the fans.

R1: Lastly, Elaine—let's talk motivation. What fuels your fire? What inspires you on a regular basis?

ELAINE: Family.

Timing is a funny thing. When I first started with the Bears in January 2012, I was married with children. I had just moved to Chicago. [In the past] I'd experienced living in major cities because I'd lived in Philadelphia and New York, but it had been the childless life with my husband and our dog. But now we're living in the suburbs with two children! I have Mason who's 3-and-a-half and Michaela who's 2 years old. They inspire and challenge me every day.

I'd like to say that being a female minority Millennial—and now a mother—allows me to have a unique perspective on my dream job here with the Chicago Bears.

ORACLE + MOUSER ELECTRONICS MARKETING AUTOMATION

If the aphorism is true and timing really is everything, then automation is one of the most dynamic tools that modern marketers can deploy. The numbers are clear: Marketing automation drives a 14.5% increase in sales productivity and a 12.2% reduction in marketing overhead. "The power of timing," as Oracle calls it, shows in your organization's ability to plan, execute, and scale campaigns that predictively—not reactively—deliver rich digital experiences that engage and convert.



Candice Willingham
DIRECTOR OF MARKETING AUTOMATION
MOUSER ELECTRONICS

BACKGROUND

RELATIONSHIP ONE: Thanks for sitting down with me today. To get us started, could you provide some context around what Mouser does, as well as your role with the company?

CANDICE WILLINGHAM - DIRECTOR OF MARKETING AUTOMATION AT MOUSER ELECTRONICS - REVEALS HOW M.A. TRANSFORMED HER COMPANY BY STREAMLINING PROCESSES, ENABLING CROSS-REGIONAL TEAMWORK, AND LIFTING THE EMAIL OPEN RATE BY DOUBLE DIGITS.

CANDACE: Absolutely. I manage the marketing automation team for Mouser Electronics. Mouser is a global distributor of electronic components for over 600 manufacturers, and we focus on stocking the newest products and technologies for design engineers and buyers. My team is responsible for email marketing and subscription database nurturing

campaigns, and we use marketing technology to make these things happen. I've been in the email marketing space for probably over 10 years. Marketing automation, six or seven.

CHALLENGE

R1: Excellent. What sort of impact has marketing automation had on you and your team there at Mouser? How did you guys first start with an automation program?

CANDACE: Well, when I first arrived at Mouser a little over four years ago, I did an assessment of the current tools and capabilities. I learned quickly that we had an enormous amount of opportunity to consolidate data, streamline processes, and make the direct marketing team more productive and efficient. So, I set out and made it my mission to cut out as many manual processes as possible, and to bring Mouser to the next level. Marketing automation was just the right move for us.

Implementing it took a little longer than we anticipated, because we had several systems to put in place [first]. But our goal was to implement marketing automation globally—to move our subscription into this tool so we could automate welcome nurture programs, vacation programs, and more.

SOLUTION

R1: How did you go about reaching those lofty marketing automation goals you set for Mouser? What were the concrete steps you took to put M.A. in place?

CANDACE: It was a grueling process. I saw the need, and in our company it's

helpful if you can find an advocate to adopt [your stance] and get on your side if you want to implement something big. Because it takes a lot of investment—not only time and energy but also money. So, my first step was to seek out an internal executive champion to advocate for making the move. Then, I picked three marketing automation tools to evaluate.

I presented those, along with my champion, to upper management. And then ultimately, we came to a final choice [between those three tools] and presented that choice to executive management for approval.

R1: Given you're speaking with us at Relationship One now, I suppose it's obvious what choice you made!

CANDACE: We ended up going with Oracle Eloqua. It has been very, very good for our company. It's been able to help us with some of our difficult processes, and we're really customized [with how we use it]. We had built a lot of things internally [prior to adopting it], so Oracle Eloqua was the first opportunity we had to get a tool that was in the cloud—kind of outside the box. It's been very exciting.

R1: You said it was a "grueling" process to get this program up and running. That's a word I don't hear too much in marketing—even if people are thinking it. What made the challenge of bringing M.A. to Mouser so daunting? What might you do over to make it easier?

CANDACE: I would probably have less cooks in the kitchen. It took a lot of buy-in [to get approval], and we also have systems all over the company that were different teams' responsibility. Having to pull all those pieces together and have this huge implementation team—that was tough. I would do that differently, probably by meeting people individually and talking to them about the things we needed, like data sources. If I'd had a smaller implementation team, I think the process may have gone a lot smoother and a lot faster.

R1: I hear you—always hard to try to cook by committee, so to speak. But let's focus on some positives, too. What were the most important steps you took in this journey to bring M.A. to Mouser that really have paid off?

CANDACE: Specifically, the most important step for Mouser—because this was new for us, to get into this type of technology—was to find partners that could help us. We didn't have any team member internally who knew how to build a data model. We'd never had a data model, actually; we had customer data in one place, we had subscriber data in another place, we had processes in another system. So, it was helpful to find partners that we could work with in order to consolidate this information.

Thankfully, we had several that were very good to

us. One specifically: Relationship One! R1 helped us [achieve] a lot of the different processes and syncs and notification programs that we use today.

R1: Thanks so much. And how about some of the other pieces you guys are using to bring M.A. to life at Mouser? Typically, Oracle Eloqua's marketing automation doesn't stand alone but works with other

"WE ENDED UP GOING WITH ORACLE ELOQUA. IT HAS BEEN VERY, VERY GOOD FOR OUR COMPANY."

data sources and tools. What kind of stack has the team built?

CANDACE: Since we kind of just started [our M.A. journey], the first thing we did was get the data in the system, so we can have our customer/purchase information. We have a daily sync with our point-of-sale system; as an online company, we do have a lot of information there. We also have set up tracking on our website to be able to pull in data not only on the people who we already have an email addresses for, but also for prospects and potential future business. So, we've hooked in Google Analytics there.

We have some other outside tools we use that help us extend our marketing for translations and validation and deliverability. It's not just a simple [mindset of], "Go in, set up your users, and turn it on." There's a lot of thinking around what kind of data we want, what we want to get out of the program, what our daily processes are—what else we need to know in order to make our jobs easier and more efficient and more productive.

RESULTS

R1: Love it. And where are you today with this program? What sorts of results are you seeing now that the program has been in place?

CANDACE: We've seen an increase in open rates as high as 20% in some programs. But aside from that, we're also now able to analyze our data to find better ways to segment; we increased our click rate by 1% in one month by changing our strategy and adopting marketing automation. We didn't have the type of visibility before that with data and results, so now we're excited to be able to adjust our strategies and quickly see a big result.

[For example,] marketing automation has allowed our regional teams in the Americas, Europe, and Asia to do more with fewer resources. Now we're able to share our segments or campaigns [between regions], so we can repurpose and adjust locally.

R1: Beyond the numbers, what other wins or success stories could you share with us at this stage?

CANDACE: The biggest win for our company is that we've invested in marketing automation. That's the hardest part: to get started. To have a company that sees the vision and the future and understands what the next right step is to take.

I'm very thankful that Mouser has made this investment, not only in the tools but also in the team. We're a newly formed marketing automation team, and we just started this year even though we've been working on [the M.A. initiative] for a few years. The team will grow more over the next two years. So to me, it's successful that we can see Mouser puts enough emphasis on this type of technology, that Mouser thinks marketing automation has global importance.

FUTURE

R1: That's fantastic. As you said earlier, having executive sponsorship that believes in your vision is just invaluable. On that note, what other projects might you be seeking out buy-in for? What's next on the roadmap for the mighty Mouser M.A. team?

“MARKETING AUTOMATION HAS ALLOWED OUR REGIONAL TEAMS IN THE AMERICAS, EUROPE, AND ASIA **TO DO MORE WITH FEWER RESOURCES.**”

CANDACE: Now that we've laid the foundation [for M.A.] for all the global teams, we're focused next on data analytics and reporting. We have an enormous amount of data at our fingertips, but we don't necessarily have the tools to analyze that data and make sense of it.

So, I just hired a marketing analyst—the first one we've ever had at Mouser—and that's super exciting because this person is going to help implement a data management tool to start analyzing our customers or prospects, which will ultimately help us move into lead scoring and nurturing. All so we can be sure we're getting the right message to right people at the right time.

R1: What is the main thing about marketing that inspires you?

CANDACE: I'm always trying to see what's going to happen next—asking myself, "What's the big picture? What's going to add value to my company or to my life personally? What's going to deliver value to the customer?" So, I think innovation is what inspires me. I'm passionate about it. ▲

What role does technology play in making cities of the future smarter and more efficient? Mouser explores

this question in a five-part video series released this year called "Shaping Smarter Cities." Part of Mouser's award-winning Empowering Innovation Together program™, the series follows celebrity engineer Grant Imahara (best known for his work on the TV show "Mythbusters") as he travels the world to explore how engineering can improve how people live.

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ORACLE + WILEY EDUCATION SERVICES DATA-DRIVEN MARKETING

Every action people take on your platforms reveals something about how you can engage, delight, and convert them. For modern marketers and their organizations, that means clean, reliable, constantly flowing data is paramount. Teams have to standardize customer data internally before they can launch new programs. Marketers have to run tests on hypotheses if they want to better predict customer behavior. Form fields should encourage leads to update or enhance their digital footprint. This is what Oracle calls "the power of insight": the ability marketers have to transform raw numbers into smarter, stronger business decisions.

**CARRIE UGARTE -
EMAIL MARKETING/
DIGITAL MESSAGING
MANAGER WITH
WILEY EDUCATION
SERVICES—REVEALS
HOW DATA-DRIVEN
MARKETING HELPED
HER TEAM PINPOINT
HOTTER LEADS FOR
SALES, STREAMLINE
COMMUNICATION,
AND EARN HIGH
PRAISE FROM THE
C-SUITE.**



Carrie Ugarte
EMAIL MARKETING/DIGITAL MESSAGING MANAGER
WILEY EDUCATIONAL SERVICES

BACKGROUND

RELATIONSHIP ONE: Can you tell us about yourself and your role at Wiley Education Services? What should modern marketers know about your organization?

CARRIE: I have about 10 years of experience in email marketing, spanning the banking and publishing industries and now education. At Wiley I manage a team that's responsible for producing the strategy behind all the email marketing that leaves this company. As

for the company itself, we are one of the leaders in strategic higher education consulting, and we provide support for online programs and comprehensive institution services across the entire student journey, from lead management to graduation [from school]. I've been at Wiley for three years; it's a wonderful company to be a part of. I'm really excited about what we do.

CHALLENGE

R1: Given your deep expertise in email marketing, what are some campaigns

you have run at Wiley? At a high level—from a bird's eye view—what problems have you tried to solve with email campaigns?

CARRIE: Our business performed analysis on certain audiences we had, and from that we determined that our sales team was spending a lot of time chasing leads who had a very low probability of converting. We were actually able to calculate the likelihood [of conversion] to be 0.02%.

R1: Wow, less than one percent? Almost one percent of one percent?

CARRIE: Yes. It was at this point we told ourselves we needed to get everybody at the table. We needed to start talking about how we can take better care of these audiences. We made the decision we could do it with email automation. Our hypothesis was that we could still convert those [low-probability] audiences; we just had to be more strategic, so we could save the sales team time.

"EVERYTHING WE
DO, WE DO TO MAKE
SURE THAT WHEN
WE TARGET AN
AUDIENCE **WE ARE**
TARGETING THEM
CORRECTLY"

R1: How did you test this hypothesis?

CARRIE: We piloted an email automation campaign with three of our partners, and started by removing this [low-probability] segment from the sales team queue. Now, after a lead was exactly 60 days old, we'd take them out of the sales queue and pull them into our email automation campaign. And at that point we'd ask the lead a simple question: "Are you still interested in our degree program?"

From there, we defined three paths for the lead or student to take. The first was the "no" path: "I'm no longer interested." This occurred when the lead clicked no, which made us now decide to opt them out of all communication. Since we had an integration between Oracle Eloqua and Salesforce, we also opted them out of email, SMS, and phone calls. After they clicked "no" [to the question, "Are you still interested in our degree program?"], they were taken to a landing page where they could complete a loss survey.

The second path is the "yes" path, where the lead says, "I'm still interested." At that point we had integration with Oracle Eloqua and Salesforce, so we connected this person with someone on our sales team.

The third path occurred when the student or lead just didn't respond at all, so we didn't know if they were interested or not. We decided to send this contact two nurture emails that described our value proposition and also addressed the two main objections that our sales team said [were commonly] found in the student journey.

R1: And what if neither of those nurture emails prompted a response from that person on the third path?

CARRIE: At that point we'd send them an email that I call "the break-up email." [The general message was,] "Hey sorry, we're going to let you go. It's not you—it's us!" We then permanently remove them from the sales team queue—not from our database, just from the queue, which changes their sales stage.

SOLUTION

R1: How did you build this three-path campaign? What was its architecture?

CARRIE: We strategically chose three particular partners that either had a geography we wanted to reach out to or a volume we wanted to measure on. We launched these as individually performing programs in Oracle Eloqua. We used Program Builder [to engineer the programs] and then let them run for several months.

We then took the data and metrics we gathered, did an analysis, and performed a post-mortem with our teams so we could say, "Hey, what went wrong? How can we do this better?" From there we could determine the amount of time savings and the amount of conversions. The time savings were incredible, and the conversion rate was at 0.02% or better, so we were able to prove our hypothesis correct. We were able to sustain the conversion [rate] of the [low-probability] audience, as we had thought we could.

R1: What was the high-level thinking or principles that guided this pilot program? What was the overall strategy that enabled you to prove your hypothesis?

CARRIE: Everything we do, we do to make sure that when we target an audience we are targeting them correctly, from start to finish, with personalized experiences that use very timely and appropriate follow-ups by sales.

R1: Where are you today with these programs?

CARRIE: Today we've launched a dynamic campaign that serves all of our partners, so our partners only need to flow through that one campaign. We did this so we wouldn't have to maintain and build 40 different individual programs, and we used field merges and dynamic content to personalize each email according to the partner each lead could be associated with. Since there's only one campaign, if there are any modifications or updates that we need to make, we don't have to make them 40 times. We only have to do it once. It's super-cool.

R1: How about the email automation campaign with the three paths? How is that going?

CARRIE: We launched it in January 2017, and it takes a minimum of about 90 days for contacts to flow through and complete the automation. In addition to historical leads that are 60 days or older, we also have new leads automatically dripping into the campaign every night.

R1: How long did it take you to build both programs?

CARRIE: The pilot we were actually able to launch in about eight weeks, and the dynamic campaign took us a little bit longer—about five months. But that's because we had a lot of data cleanup to do prior to launching the dynamic campaign. That was a difficult task to overcome, but we did it and now it's thriving.

R1: Was that the hardest part? Data cleanup?

CARRIE: Yes, definitely. Data is key, so if your data is not right [to start with] then you won't be able to perform campaigns with accuracy. That meant we had a lot of cleaning to do before we could start. We had to get ourselves up-to-date; because of all the [form] field launches we were doing, we had to add additional fields to our Salesforce instances, and we had to get

multi-departmental involvement in data cleanup. Dirty data really has been the biggest issue all along.

RESULTS

R1: How has this email automation campaign impacted Wiley? You've said it proved the hypothesis your team set out with, but beyond that—what sort of outcomes have you seen?

CARRIE: This is the fun part! In the pilot, we have approximately 3,000 leads that flow through. We estimate on average that our sales team, who adopts these leads, either emails, calls, or texts [a contact] 15 times. We also estimate that the time spent on each contact is approximately 10 minutes.

If you multiply all those numbers together, it equates to about 82 hours of time [per lead] we get to give back to the sales team. That's time we get to put back into reaching out to those leads who actually are interested and who are more qualified. And our sales team then gets to do what it does best, [focusing on] the best possible leads that we have.

R1: You've saved over 82,000 hours total? That's unreal!

CARRIE: Yes! It's crazy. When I went back and did the analysis ... with those little numbers, you think it's no big deal. Just 10 minutes. But when you look at it on a grand scale, and when

you estimate that we have hundreds of people on our sales team, it makes you say, "Oh my goodness, this is such a big deal." I started thinking, "We need to blow this out of the water and do more automation." That was one of the best things about the impact of this program. It [increased] visibility around time savings, and showed us how much we can put back into the business.

R1: How else has the organization benefited from putting this campaign in place?

CARRIE: There are a couple of other big wins we also took from it. One, we were able to clean up our database. We were able to remove leads that just weren't interested in our program, so we eliminated the need for our sales team to call them. We also permanently removed those that had never responded from the sales queue. Those were both huge things.

The second thing I can think of is the loss survey. Anyone who clicked "no," we asked them to complete a

loss survey [telling us] why they clicked "no" and were no longer interested. The significant thing about that is people actually completed the loss survey. They told us why [we'd lost them], and that information is so golden. In the pilot [a.k.a., the email automation program], we had over 1,500 people complete the survey, which is a 60% participation rate. And then on the dynamic campaign [which entered 40 partners in the single nurture], we also maintained a 60% participation rate.

R1: As you said, loss surveys can provide "golden" information—real insight into how and why people exit the funnel, which is just so valuable for us marketers to know. What sorts of questions did you ask in the survey?

CARRIE: We asked questions like, "Did you choose another school? Which one, and why?" And, "If you chose not to pursue education anymore, then why did you choose not to pursue it?" The answers we got back were just amazing, because now we have something data-driven and we can take that [information] back to our partners and make adjustments to our products, so we can have a better product to offer our students. That's something we could never do before.

We were also able to sync the data from the loss survey with Oracle Eloqua and our Salesforce instance, so we could analyze the data by partner and individual programs.

FUTURE

R1: So Carrie, if you were starting over today, knowing what you know now—is there anything you would do differently? Are there lessons from the pilot and dynamic campaigns that you plan to remember or apply to future campaigns?

CARRIE: It's really hard to say that I would do anything differently or change anything. When I first started working at Wiley, my boss told me something great: "I would rather you try something and fail then not try anything at all." That really resonated with me. I think sometimes we have a tendency to get into a cycle of analysis paralysis. Yes, there are times when you need to take a step back and analyze and pivot on your idea. But there are other times when you just need to move forward and learn as you go. This time, it was [the latter]. I learned a lot of things along the way, but even now I don't know if I would do anything differently.

R1: What's next? What's the next interesting project coming down the pike for you and the team?

CARRIE: Oh, gosh. Since this was a huge success, we have a line of executives waiting for the next automation [campaign], which is exactly what we're trying to determine. We're going to do an analysis on the complete student journey, and look at it from the first interaction until they are alumni, so we can see where automation fits best in that journey. I think in the future, we're going to be looking at a complete marketing strategy that includes a lot of user experience interfacing with our websites and then a lot more email automation.

R1: And as a marketer, what would you say is the one thing you can't live without?

CARRIE: This might be a surprise to you, but I'm going to say data.

R1: No surprise at all! It's absolutely our most common answer.

CARRIE: Data is everything. It's king. It enables you to analyze campaigns pre-launch and post-launch, so I don't feel I'd be able to do my job to the best of my ability without it. Automation can't function to the best of its ability without it, either. Data is my answer, without a doubt.

R1: In the vein of what you "can't live without," here's another thinker: What inspires you?

CARRIE: Now we're getting to the heart of it all! So, I don't mean to get a little bit cheesy, but I am going to say it's my family and my team. There is nothing that spurs me on more than the people around me. They inspire me. They challenge me. They encourage me. Wiley is a great environment to be in professionally. They just keep me moving upward and reaching for my goals, and I think that's great. Shout-out to my personal work family out there! 

"82 HOURS OF TIME PER LEAD WE'VE GIVEN BACK TO THE SALES TEAM."

ORACLE + POLYCOM LEAD NURTURING

As marketing shifts from bulk outbound messages to understanding and facilitating each prospect's buying process, we need new technical capabilities. Marketing automation can guide the conversations, timing, and personalization needed to make that shift. Combining compelling offers with strong messaging and segment research, M.A. connects the art and the science of modern marketing. It helps us build logical, high-value campaigns that drive buying signals to emerge from leads.

**A.J. SEDLAK -
SENIOR MARKETING
AUTOMATION
MANAGER AT
POLYCOM—
EXPLAINS HOW HIS
TEAM USED M.A. TO
ENSURE CONTACTS
WERE NEVER
ENROLLED IN MORE
THAN ONE EMAIL
NURTURE AT A TIME,
WHICH FUELED
MORE UNIQUE
OPENS, FEWER
UNSUBSCRIBES, AND
BETTER CAMPAIGNS.**



BACKGROUND

RELATIONSHIP ONE: Give us some background information about yourself, your role, and Polycom?

A.J.: Sure. Polycom is a unified communications and collaboration

company, which basically means we specialize in voice and video conferencing and secure content sharing. At the risk of sounding like our marketing materials, we're trying to enable the workplace of the future. We're trying to help people work from anywhere, at any time.

We're most commonly known for our three-legged conference phones you see on TV and in the movies, where there are big telepresence rooms where several people are sitting at a table, and they're all looking at [their colleagues] on big screens.

Our team is the corporate marketing automation team. We handle the Oracle Eloqua administration and the processes and polices for global teams, who are all doing different things in Oracle Eloqua. We support them, depending on what their needs are. Sometimes we support by consulting, so they can make their own plans; other times, they submit tickets, and we execute campaigns for them from start to finish.

CHALLENGE

R1: Take us to the onset, the strategizing behind the big marketing automation project your team took on at Polycom. What was the "x" you were trying to solve for?

A.J.: Our problem was that we had multiple nurture streams going on at one time, and as much as we tried to segment as tightly as we could, there were still times when people overlapped and they could be eligible for multiple streams. We tried to use segments and filters to keep this really solid, logical order, but

"IN EMEA THEY'VE
SEEN A 250%
INCREASE IN UNIQUE
OPEN RATES AND A
**1000% INCREASE
IN DEMAND
GENERATION FORM
CONVERSION FROM
THEIR EMAILS."**

it was just painful.

We had people who were IT managers in the healthcare industry, so they might be eligible for multiple different streams—and trying to use segments and filters to look at other nurture tracks [those contacts could be eligible for] was a mess. And God forbid we had to change the order we wanted to do the nurtures in, or take one of the nurtures out of the mix. It was just crazy.

SOLUTION

R1: How did you resolve this? How did you retighten those screws on the nurtures, so people could no longer be eligible for so many different streams simultaneously?

A.J.: Ultimately, we came up with a system that allowed us to make sense of all that. We [removed] the segmentation aspect and used a system that was essentially external to the campaign, which allowed nurture enrollment to happen in a logical order.

Each campaign became hinged on the idea of three shared lists. There's one list for being eligible [to enroll in] a campaign, one for being active in it, and one for being completed with it. Using that and a couple of contact fields which indicated our current nurture and our most recent nurture for a particular contact, we could then manage enrollment better. I call the two main parts of this [logic] "the gatekeeper" and "the keymaster."

R1: Is that a Ghostbusters reference?

A.J.: It is! So, in the Campaign Canvas itself, we've got the gatekeeper, and it is sort of the nightclub bouncer. It sits there and it looks at the segments that are coming in and decides who gets to move on. The first thing it does is it takes those segments and puts those contacts into the eligible list. And in the background, we've got Program Builder running, which is where the keymaster is busy looking at the eligible lists and trying to decide who goes into what campaign.

So, we've got this "Current Nurture" field on the contact record, and if it's empty it means this is somebody who is eligible for something and not in anything else right now, so let's take a look at what we should be sending them. Then using our series of decision rules, whichever nurture they hit first on our priority list, we say, "OK, let's let them through. Let's give them the keys to the gate."

And then back on the Campaign Canvas, the gatekeeper is now looking at this active list. And the keymaster says, "Take them out of the eligible list and

put them in active." So, the active list is now populated with people who are OK to go down this stream. At that point it's like a normal campaign, [following] whatever rules we have as far as logic and filters and emails. And at the end of it, we take the contact and move them into an exit program.

R1: What's the exit program?

A.J.: It takes contacts out of the active list and puts them into the completed list, so the "Current Nurture" field can get blanked out and we can copy [the name of the nurture they just finished] over to the "Most Recent Nurture" contact field.

Now we've got a contact who's done with this nurture, so they can go into another nurture if it makes sense. But that keymaster program is still looking at those eligible lists, looking for that blank nurture field in [contact records]. When it finds one, it says, "OK, here's someone. Let's reevaluate them." And then the process starts all over again.

R1: So, no one's ever in more than one nurture at a time? And the process repeats every time someone completes a program, which makes them free to go on to the next highest nurture on the priority list?

A.J.: Exactly. And because of the "Current Nurture" contact field having to be blank, we basically make it impossible for anybody to enter more than one of these at a time. But this is just for the nurtures. We still have time-dependent things like webinars and live events that are not managed [by this logic]. We don't have to put every campaign into this system, just the ones that can happen at any point.

And we can add and remove programs and campaigns onto this priority list. We can replace outdated material very easily. It's super flexible. We can even change the order of priority for the nurtures, if we decide that what was Priority #1 today will be Priority #4 tomorrow, so the next time people are evaluated [it can be done] by that new order.

R1: How long did it take to build out the whole program?

A.J.: It was an idea that had been percolating for quite a while. I'd say starting from the time we really got into the nuts and bolts and started to experiment and work through it, it probably took about two months. There were a lot of iterations. I worked with Matt Jackson, our director, and Britt Dyer, Oracle Eloqua Certified Marketing Cloud Consultant at Relationship One; we bounced ideas off each other, talked through thoughts we had on how we could execute different parts of it, poked holes in it. That's a crucial part: looking at [a campaign] and knowing it looks good to you but having someone else point out, "Hey, in this scenario, it's going to fail." Sometimes that causes drastic changes; sometimes, a little tweak. But that process is very important.

R1: Just to understand the scale here, how many active nurture programs does the marketing team at Polycom have running at any given time?

A.J.: Right now, for example, in Europe we've got about 15 different nurture campaigns that exist. And that's just in English. We've also got French, Russian, German, and other languages. I think in North America there are 12 currently active campaigns. In practice, no one's going to be eligible for all of them. But we still build that priority list with that hypothetical scenario in mind: "What if they could get all of them?"

What would that order look like?"

RESULTS

R1: From a results perspective, how do you view the success of this automation initiative you guys undertook? What changes have you seen?

A.J.: In efficiency gains alone and in reducing our mental anguish, it's immeasurable. It's been huge. The hours that we would spend trying to make these segments work—and they were unreliable even then.

No matter how hard we tried, they just never quite worked as smoothly as we would've liked. Also, the segments used to be completely specific to individual campaigns. Even if we had one that sounded generic—like I said, "IP Managers in Health Care"—because there was all this extra [campaign-specific] stuff on there, it was not a segment we could reuse for the next canvas. So, we've gained a lot in terms of efficiency, just in that regard.

R1: What about numbers? Are there quantifiable outcomes you could share?

A.J.: In North America last year we launched about 20% more campaigns because we opened up our time, gained more time as a resource. Also, our nurture stream unsubscribes went from .5% before this system down to about .1%. That was a huge gain right there. And that's just with us using the Oracle Eloqua one-click unsubscribe. We're working on a Preference Center right now with Relationship One to further reduce our unsubscribe rate.

And in EMEA, in combination with some enhanced segmentation efforts, they've seen a 250% increase in unique open rates and a 1000% increase in demand generation form conversion from their emails.

R1: What was the hardest part about arriving at this solution? These are incredible numbers, great uplift—but numbers can hide the challenges that go into making them happen, the elbow grease. What sorts of roadblocks did you guys face in this program?

A.J.: A couple of things. One—you know, any time you've got a relatively small team, finding the time to push your program forward is always difficult. You're so busy doing the day-to-day stuff, putting out fires, that finding the time is tough.

But we got lucky: At one point, our North America team actually put in a formal request for this system and said, "We need you to do this." Any time you're a shared service and you're lean, that's gold. Because that's them saying, "It's OK to prioritize this over some other things. We know we need this."

On top of that, we knew we had a couple of requirements for the system. It had to be super flexible. We had to be able to adjust the priority [of nurtures]. We had to be able to adapt to changes in the market that might affect a campaign at the last minute. It had to be able to juggle segmentation filters. And it had to be easy to implement.

R1: Easy to implement internally?

A.J.: Yes. Our team's philosophy is to empower our users. We've got about 50 Oracle Eloqua users [on the team]. They do different things: Some of them are just in there reporting; some of them are [acting on] fairly advanced tactics. And to the extent that they're comfortable, we want to be able to empower users to do whatever they need to do. So, we knew that no matter how complicated the system itself was, it had to be easy for people to use to set up their campaigns.

R1: Was there anything you learned about Oracle Eloqua during this initiative?

A.J.: Oracle Eloqua is a very powerful platform. It can't possibly have all the bases covered and have solutions that exist out of the box that work for everybody. But if you really get down to it, if you know the system well enough, you start to see how things work. You can find a way to make these different powerful tools work together and do what you need them to do, and you can build the solution that works for you.

It may not work for the next company—but it works for you. That's the interesting thing about working with Oracle Eloqua.

FUTURE

R1: And what's next? Now that you've got this extra capacity you didn't have before, what's on the horizon that you're excited about?

A.J.: We've got a lot of ideas for how this [system] can move forward, one of them being—well, the keymaster lives in Program Builder. So, with the new Program Canvas, that's going to be powerful, because one of our Achilles' heels right now is processing time since we have so many copies of this keymaster for different theaters and different languages.

We can't run them all in priority mode, so we have to run them in standard mode, and that means each step takes 15 minutes. That means if we have a batch of 200,000 contacts in a campaign, we could be looking at several hours for them all to get processed through the system.

But Program Canvas is very fast, and we're waiting for a few more pieces of that to come into parity with Program Builder before we can really use it. I'd like to get that moved over as soon as we can, as soon as all the features are there, because that'll be a huge help.

We're also looking at ways that we can do some dynamic reassignment in the midst of a flow

"ORACLE ELOQUA IS A VERY POWERFUL PLATFORM... IF YOU KNOW THE SYSTEM WELL ENOUGH, YOU START TO SEE HOW THINGS WORK. **YOU CAN FIND A WAY TO MAKE THESE DIFFERENT POWERFUL TOOLS WORK TOGETHER AND DO WHAT YOU NEED THEM TO DO."**

What would that order look like?"

RESULTS

R1: From a results perspective, how do you view the success of this automation initiative you guys undertook? What changes have you seen?

A.J.: In efficiency gains alone and in reducing our mental anguish, it's immeasurable. It's been huge. The hours that we would spend trying to make these segments work—and they were unreliable even then.

CREATIVITY, DRIVEN BY FLEXIBILITY

and really catch people at the right moment to move them from one track to another, rather than having to wait for them to go through this two- or three-week process. At that point, it could be too late. The window could close.

R1: Using automation, of course, is all about reducing time on the backend for us marketers. Are there any other ideas you're thinking about exploring?

A.J.: We also have our analysts working on some day and time analysis. So, in addition to just being able to reduce frequency through the use of the system, we also want to reduce the perception of frequency, which is a whole other concept in the inbox.

We'd like to see what days and time are the best for different kinds of communication, so we can spread things out even more intelligently, and say, "OK, nurture type emails are better on Tuesday afternoons; webinars are good in the morning." The goal is to really tighten up all of our send windows for all of our communications, so we can spread things out as much as possible.

R1: And what would you say inspires you?

A.J.: The smart, passionate colleagues that I work with. I'm a problem solver at heart, and so collaborating with people who aren't afraid to come to me and say, "There's this thing we're having trouble with and we don't know how to do it, and we really want to do it right"—that gives me the inspiration to be like a marketing mercenary and say, "Let me help take care of this problem." That kind of mindset helps us see: What are our limitations? What are our opportunities? What can we do for each other? 

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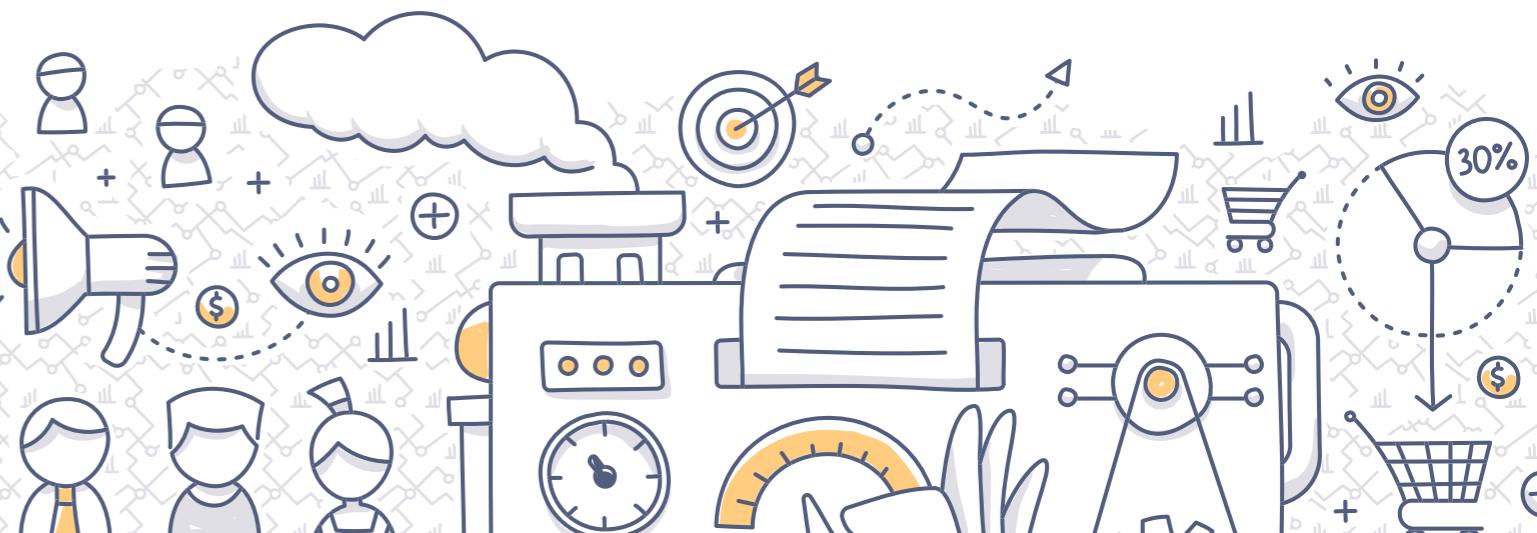
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**MIKE BRAUND -
DIRECTOR OF
MARKETING OPERATIONS
AT TABLEAU SOFTWARE—
REVEALS HOW POPULAR
SOFTWARE COMPANY
TABLEAU SOFTWARE
IS REVOLUTIONIZING
ITS INTERNAL MODELS
FOR DATA ANALYSIS
TO DRIVE STRONGER
CONVERSIONS.**



Mike Braund
DIRECTOR OF MARKETING OPERATIONS
TABLEAU SOFTWARE

BACKGROUND

RELATIONSHIP ONE: There are marketers out there who aren't familiar with what Tableau Software is. Could you explain what this software does, as well as your role within the organization?

MIKE: Tableau Software is a data visualization product in the BI space. It's best-of-breed, definitely. I use the product every day; and if I ever left Tableau Software, being able to use it [at this hypothetical new job] would be part of the demands I put out there. It really is

that influential. What we're doing in terms of everyday marketing operations at Tableau Software is really a systems and data function. We're there to empower and enable our marketers. We're really focused on using technology to create scalable solutions.

If people aren't familiar with the Tableau Software story, it's been a true rocket ship over the past five years. We've literally seen 50% growth for about five to six years—so, scalability is at the heart of things that we're focusing on when it comes to solution building. Technology plays a big part of that. And when you're dealing with technology, in comes the data component, too; so we're also responsible for things like lead management models, campaign models, and so on, so that our marketers understand how to measure the effectiveness of what they're doing, can see impact, and make meaningful decisions.

CHALLENGE #1

R1: Great description of your guys' mission. Today, I'd love to discuss three separate initiatives that the Tableau Software team is taking on. To start, can we talk about how your team rebuilt Tableau Software's inbound program engine?

MIKE: Of course. Tableau Software's had an ongoing instance of Eloqua for almost 10 years now. Same with Salesforce. So, since some of the models that we are doing are a little bit outdated, we've had the pleasure and challenge of trying to modernize them.

In our existing campaign model, we were capturing marketing touches as campaign memberships in Salesforce, for everything from a paid search interaction to an email to an in-person event to registration for a webinar. All of those things were being created as similar data points.

Where the challenge came is that you'd have to group a series of things together in order to be able to look at the greater picture. But you might have 20 [different] campaigns from a paid search driving to one asset, which would make it difficult for campaign managers to understand easily and quickly how effective individual campaigns had been when they looked at the data.

I know this might sound like an obvious problem to avoid for some marketers or companies that are just getting started now, but we had this old model so we had to go and refresh it.

SOLUTION #1

R1: How did you go about doing that? How did you update the "old model" to better align with the needs of Tableau Software's campaign managers?

MIKE: Basically, what we've done is create one master campaign for an asset—let's say, a white paper—so now we're capturing all of our channels that are driving traffic to that asset through their UTM variables, covering both outbound and inbound. And we bring those [variables] on as custom campaign member fields and field values.

R1: And this enables you to analyze how different contacts in different campaigns interact with the same asset? Cool stuff.

MIKE: The great part about the way we've done it is we've created an application on the website that can capture that information and create an understanding of attribution for up to a 24-hour window. Where you might see some additional value with that type of model is for our partners. We use partners' sourcing information from the traffic they're driving in order to assign leads to them.

R1: Could you provide an example?

MIKE: Let's say a partner drove somebody to a partner's landing page, but then that person decided they didn't want to download the trial or whatever

offer is available at the time—but they did want to go learn more about Tableau Software. That person would click off that web page, go start downloading content or viewing free on-demand training. And that partner wouldn't get any attribution for that or even get that lead assigned to them.

With this new model we've got, this is now getting attributed back to the partner. And the data that gets passed to us comes in a similar view to what you might see in Google Analytics. You're seeing all the channels that drive traffic over time. And we're using pre-funnel understanding, so you don't necessarily need to have people submitting forms to build this data. We're capturing all that website activity using Eloqua.

R1: And what about post-funnel understanding, so to speak? What if someone does convert on a form? How does that impact the data pull?

MIKE: If someone does convert on a form, that passes through Eloqua and then eventually to Salesforce in the CRM, so that we can see that data there and understand what's driving conversions.

Part of the interesting thing about the way this model works is the need for data accuracy, so we can trust it enough to use it. The native campaign response functionality in Eloqua relies on contact fields, for which you only have one value or most recent value to refer to. So, we've actually ditched the little "briefcase step" that everybody should be familiar with in creating campaign members, and we've started capturing every single form submission in custom data objects, passing those new UTM variables there. Then we use Program Builder to create campaign members the old-school way.

With the high-transaction and high-volume model that we have at Tableau Software, we're able to trust that those campaign conversions are accurately marked, with the correct channel that drove that conversion. [This trust is necessary because] it's a big project, and one that's used every day in analysis and decision making.

RESULTS #1

R1: How does this model influence decision making?

MIKE: It's introduced some popular dashboards that our more executive people might look at. Now, they can see simple a lead flow that is coming in on our offers. They're able to look at lead flow across their channels in a streamlined view, which shows marketing funnel conversion through color-by-volume. They can see how far leads are making it through our funnel and understand the effectiveness of both offer area and channel type.

CHALLENGE #2

R1: Awesome insights so far. The next thing I was hoping we could talk about is the integration work you've done with Oracle Eloqua and your product. From what I understand, Tableau Software has been using this integration to better onboard clients?

MIKE: Yes. This has been a really fun project, and it's brand new. We launched it in mid-January 2017. If you're familiar with Tableau Software, Tableau Software Desktop, and Tableau Software Server (which is our on-premise software solution), then you should know we don't get a ton of product information from contacts—except for the fact that you've registered it when you received the product. This made doing really robust and enhanced onboarding programs difficult.

SOLUTION #2

R1: How did your organization overcome that roadblock?

MIKE: With the introduction of Tableau Software Online, our web-based and SaaS product for Tableau Software Server. When we started using it, we were able to begin capturing more user and site user activity. This data had been building up over the years and was being stored in Google BigQuery. So, we were finally able to start seeing the different site roles that users had.

R1: What are "site roles"?

MIKE: Different users do different things with Tableau Software. Some people can be admins, others can be publishers, others just viewers. Users have different activity types, and to be able to have a successful implementation of Tableau Software Online, we needed to encourage those different types of users to do their different types of engagement and activities.

R1: Got it. And so Google BigQuery—which lets marketers archive and access all of their Oracle data in one big warehouse, basically—was the solution to

"EVERY DAY WE WORK CLOSELY WITH THE DEMAND GENERATION LEADERS, BECAUSE THEIR TEAMS ARE THE ONES COMING UP WITH EVENT STRATEGY, GO-TO-MARKET STRATEGY, AND SEGMENTATION, WHICH WE USE TO TARGET AND GET A BETTER IDEA OF WHAT THE WHOLE MARKETING PICTURE LOOKS LIKE."

the original problem of not having enough product information from contacts about how they were using Tableau Software?

MIKE: Right. In January, we built out an ETL process from Google BigQuery, so we could start creating those site users: admin, publisher, viewer. That was an additional 75% more people we didn't know about before. We had never understood who the [different] site users were; we just knew about the site admin, who was the user that registered the product.

After Google BigQuery, we realized we have a whole new audience to target. Now we know what type of users people are, so we can start pushing them toward doing what they should be doing—whether that's publishing things or viewing things and so on. That's why we've introduced the new onboarding program.

R1: To make sure different, unique users understand how to get the most out of Tableau Software's services, for their specific role?

MIKE: Yes. The onboarding program is for both our trials and new customer sites, so we can try and make sure users are being successful with their implementation of Tableau Software Online.

RESULTS #2

R1: Could you describe the impact this program has had? Or is it still too early to know?

MIKE: We've definitely seen some results. And since we're trying to be agile marketers, everybody has already begun some iterations and improvements on these initial results. One of the biggest learnings is email is not the silver bullet for everything. We're using Oracle Eloqua to [build this onboarding program], and we're relaunching a revamped look and feel for our emails, but we really need to start messaging from a product standpoint to drive engagement. I think that's the big key.

R1: Absolutely. The hardest part of email marketing is figuring out what to say to different people at different points in time. What are some other insights you've taken away?

MIKE: We've got dashboards now that show us [there's been an] an increase in user engagement. Before, there was some obvious room for improvement, where we were just seeing people start with the tool or activate it but then totally drop off and not do anything. Now, we're starting to see some lift. We can measure how many sites got started, and then how many users at least started doing things in subsequent days.

CHALLENGE #3

R1: Shifting from the onboarding program, the last thing I'd like to review is something that's a really hot topic these days in terms of organizational structure: change management. From our perspective at Relationship One, we tend to see companies employ one of two models when a big, sweeping change is implemented: a center of excellence model or a shared service model. What has your experience been with change management?

MIKE: This topic is really interesting to me. It challenges my belief in how things should be done, versus how things have to be done. For the five years I've been at Tableau Software, we've operated with a decentralized model—where marketing operations has been there to build structure and process that the marketing managers can then go execute within. This model gives the managers structure and empowers them with technology.

But with the hyper-growth of Tableau Software, we've had a huge increase in the number of employees and new hires. To be able to support what's going on, there are now over 200 marketers at the organization. That introduces specialization in work. In other words, we hire now based on wanting to find people who specialize in experience for our prospects and customers, which I think is the right thing to do. [But these specialists] may not necessarily be good at the operational side, either from lacking the skillset or not having the interest to learn. So, we've identified the need to go ahead and start centralizing this work again.

SOLUTION #3

R1: How are you performing this centralization? How are you guys at Tableau Software executing that move away from decentralization toward an approach that is, essentially, its opposite?

MIKE: We have begun to staff a new center of excellence, so we are big in that model. That's probably been the biggest change management piece that I've seen in our marketing department since I've been here, and this is because it's affecting the execution of everything and forcing our campaign managers to develop new skillsets.

R1: How is this shift to the center of excellence model forcing managers to cultivate new skills?

MIKE: Project management is about planning, and structure is being introduced that [reverses the ability for] people to just execute on the fly. To execute some of the larger integrated campaigns that we're running in marketing, we have to start developing and planning and scoping [project elements] three months ahead or six months ahead, when you think about what's all encompassed in executing.

Our team has grown over double in the last four months, but I feel like some people aren't quite ready for this to be done. But since our goal is to make sure the customer experience is the best it can be, we're allowing our more experienced folks to focus on [the shift], as well as our operational experts.

We've got a really cool team of smart marketing operations folks that are going to provide a great service. But it's a big change. It's going from a manager being able to have the flexibility to go run a project to us relying on a team that we're managing to request work to be done—and that team then delivering all the requirements of that request so we can execute it properly and make sure it's done correctly.

RESULTS #3

R1: What have the outcomes been from this movement to centralization?

MIKE: Well, you have a vision. And you're not always sure if that vision is going to manifest in the end result, but it's important first of all to just have a vision and communicate it with everyone, so we all know what we're marching toward. We're seeing the challenge [of the COE shift] in our London office, for example, where some folks specifically like to use Oracle Eloqua; they enjoy that part of their jobs. But part of the change management discussion is that some people enjoy using Oracle Eloqua and that element of their job has to potentially be removed, while some other people say, "You know, I don't want to work with Oracle Eloqua," [but they may have to now.]

So, we might end up seeing a hybrid approach in the London office, where we've hired a new marketing operations manager so he can perhaps be the central expert there. But in other places the transition has been smoother. Definitely in our Seattle office, it's humming pretty well and we're picking up steam [post-centralization] and moving forward pretty successfully.

R1: What advice would you give to modern marketers who are either going through change management or perhaps trying to implement it themselves at their organization? What things should people look out for when it comes to shifts in managerial mindset?

MIKE: I think the centralized execution model can be very valuable when you're coming from a decentralized model [as we were]. There's a lot of sensitivity to how things should be done—a fear of bottlenecks—and if anybody is thinking about moving to that model, I would really recommend spending some one-on-one time with the folks who would be involved and impacted by a change like that, just to hear them out.

R1: But that's not to say change is always met with resistance, right?

MIKE: Right. Some people were really excited for this shift and had been waiting for it to happen for years.

R1: Did you have to work with other teams or stakeholders to hammer out the details of this shift from decentralized to centralized?

MIKE: We had good executive sponsorship. Also, every day we work closely with the demand generation leaders, because their teams are the ones coming up with event strategy, go-to-market strategy, and segmentation, which we use to target and get a better idea of what the whole marketing picture looks like. For us to be able to execute on strategy effectively and efficiently, it has to be really [well put together] at the top and remain so as it works its way down the hill to us.

FUTURE

R1: Very cool. So, what's next? As you and your team start to grow and gain your footing, what's on the horizon that you guys are excited about?

MIKE: Something that just got announced last month is subscription pricing at Tableau Software. That's going to have a bunch of direct and tangential effects on things we're doing in marketing operations.

Some of the cooler things and new data understandings that we're going to have to build into our lead management model is this idea of customers and users and their status with their now-term license. Now, everybody who had a license of Tableau Software is always considered a customer. We're going to have to have a cycle of push and pull, because if people go off subscription now, then they're no longer a customer. So, we need to build in that understanding.

We're also going to have to start having better and more enhanced communication programs and renewal processes, so that the whole renewal channel for email is reminding people when their term is coming up. That's really important.

And one of the cool things I've already seen at Tableau Software with the introduction of subscription pricing is more cross-departmental alignment. Sales, marketing, customer success—now all of these teams really have to be on the same page and working together. So, it's been fun to see that collaboration starting, when maybe we hadn't seen it in past years when people were more siloed.

R1: What inspires you, Mike?

MIKE: Specifically in marketing, the thing that drives me and inspires me is production. Seeing stuff happen, and automating them. Before I even got into the automation space, I loved automating. I taught myself how to piece together VBA [macros], so I could automate Excel work that I was doing.

And as I've moved into a management and leadership role, the other thing that drives me is creating a platform for my team to grow their careers and their understanding—really exposing them to a lot of the cool stuff that we do, enabling them to do fun things on our operations teams at Tableau Software, getting them involved. Letting them really take ownership of what they're doing. That's important. It helps people experience that good feeling of seeing results influence practice. ▲



"YOU HAVE A VISION. AND YOU'RE NOT ALWAYS SURE IF THAT VISION IS GOING TO MANIFEST IN THE END RESULT, **BUT IT'S IMPORTANT TO JUST HAVE A VISION AND COMMUNICATE IT WITH EVERYONE, SO WE ALL KNOW WHAT WE'RE MARCHING TOWARD."**

~ **Mike Braund**



FIVE KEYS TO MANAGING CHANGE

WHETHER YOU'RE MANAGING A MODERN MARKETING TRANSFORMATION, ROLLING OUT A NEW LEAD FLOW PROCESS, OR SIMPLY RE-PAINTING YOUR OFFICE, CHANGE COMES WITH DIFFICULTY.

No matter how great the vision, how fantastic the plan, or how awesome the paint, change is HARD. Any change you implement will be wrought with challenges. Despite the adversity, as long as you remember that obstacles are not roadblocks, you can and will succeed.

With a clear vision and a strong set of tactics for managing change, you will effectively get where you're going.

As a consultant in the marketing technology space, I have managed countless change initiatives. Whether you call them transformations, transitions, restructures, revisions, or my favorite, enhancements, your constituents will hear one thing – change. And whenever there is change, people get scared, annoyed, frustrated, and everything in between.

Change management remains a hot topic in the business world. Countless books, resources, and college courses are dedicated to it. Although there are many sound approaches, here are five key actions that I've seen make a huge difference when rolling out change in any organization.

1. HAVE A ROADMAP

You need a vision. You need to know exactly where you want to go and what you want to accomplish. The most important part of your vision is the ability to spread your passion so others, specifically your key stakeholders, believe in it as equally as you. Never underestimate the power of connecting the dots for each person involved. Tell them exactly how they will benefit.

Additionally, as important as vision is to the success of your initiative, you will fail without a detailed plan. Before embarking on any initiative, clearly document what you plan to accomplish. You need to explain, in detail, your objectives, mile-

stones, actions, resources, timeline, metrics, etc. Keep in mind, you won't have it all worked out. Consider this plan a roadmap for how you will get to where you need to be. The final plans won't be possible until you've done your due diligence in discovery with key stakeholders.

Then, as part of your planning, list any and all potential issues and bottlenecks, and devise alternative solutions if these problems arise. Don't wait for issues or objectives to be brought to your attention. Have your own objection-handling guide so you're prepared in advance.

2. KNOW YOUR STAKEHOLDERS

Although you are leading the project, you cannot succeed without buy-in and support from everyone affected by the change. Your initial goal is to share your vision and objectives with all key stakeholders, but you'll need their insight, ideas, and support to add perspective to your plans. As you draft your initial roadmap, list all key stakeholders. Who will be affected by this change? Who will benefit? Who will need to execute certain parts of the process? You may find it easier to categorize individuals by function, level in the organization, business unit, product line, etc. to structure your thinking.

Once you have your list of stakeholders, make a note of which ones may serve as internal champions. You'll want to spend extra time securing their buy-in so they can spread their support for your undertaking. Once identified, draft personas for these key individuals. Define their current role, proposed role, required process changes, etc. Document their needs, challenges, desires, and potential objectives. Keep in mind that much of this information will require conversations and interviews with these individuals.

The reason for drafting personas is two-fold:

1. It will ensure that your process and plan addresses the needs of all stakeholders as well as the organization. One person can't know it all. Take the time to learn from others so your plan will be that much stronger.
2. When you include key stakeholders in the planning process, you're naturally acquiring their buy-in. They will be much more supportive when they've played a role in the development. When their needs have been addressed and their concerns have been taken into account, an individual's participation and adoption is much higher. Remember, the more they see the WIIFM (what's in it for me), the more they will buy in.

3. CONDUCT LOTS OF TRAINING

Now that you've developed your roadmap, gone through discovery with your stakeholders, and finalized your detailed plan of action, your next key step is training. Everyone involved in the process needs to understand their role, their importance, and of course, what's in it for them. They also need to understand the details behind execution. Review the overall plan, expectations, and goals with the entire team. Each individual should get detailed training on every step of the process. In some cases, an SLA may be required. In others, detailed documentation and consistent reviews will suffice.

As part of your training, be clear about the feedback loop you're implementing. Everyone should know how, when, and to whom they should ask questions. Make sure to include opportunities for them to share what's working and what's not. In some cases, like with a formal SLA, this will be clear. In others, it may not be as obvious. Take it upon yourself to remove ambiguity in the process. Ensuring there is an open and continuous feedback loop is imperative for the success of your program.

4. GET SOME QUICK WINS

It's always important to think long term, but it's equally important to get some quick wins. Look for short-term successes that can be felt throughout the organization. Maybe you can tackle a campaign, automate a difficult process, or streamline an old process to show value right away.

Once your plan is developed, break long-term goals into milestones. Break your milestones into short-term goals. Break your short-term goals into actions. Break your actions into tasks. You get the idea. The goal is to make your long-term goals as tangible as

possible. Design your short-term actions so that each one has a measure of success that people can feel.

Most importantly, celebrate success! Especially in the beginning, celebrate every win, every efficiency gain, every conversion, every everything. Highlight how Mary from Sales or Joe from Customer Service or Luke from Marketing contributed to the success. Reinforce your message, your process, and your people whenever you publicize results to the organization. Gain traction quickly so you can really take flight.

5. COMMUNICATE, COMMUNICATE, COMMUNICATE

At the essence of each point iterated is the notion that you have to communicate. At each stage of the process, you need to communicate results, changes, enhancements, growth plans, etc. Communication does not stop after rollout. In fact, it is just beginning. Devise a clear communication plan up front. Consider each stakeholder and what he/she needs and wants to know. In the spirit of marketing automation, personalize your communication to each persona. Don't send the same message to everyone.

Communicate what matters most to each individual. Consider various modes of communication as well. How and when you deliver the message can be equally as important as what you deliver. Different individuals may need to hear your communication at different times and in different ways. Include these variations in your plan. As you develop your messaging, keep in mind that you will continue to have stakeholders at various phases along the adoption curve. Some will be champions, some will be laggards, and the rest will fall along the spectrum.

Finally, in your communication plan, include the recipients of your message, their potential adoption rate, pertinent messaging, channels of communication, timing, etc. Detail as much as possible so that you're in a better position to continue your communication over the long term.

MAKE WAY FOR CHANGE!

Any new initiative is hard. Change can be great, but it is also difficult. It's easier to keep the status quo than to change, but if you keep doing the same thing, you'll always get the same results. Change is vital to the health of any organization and, frankly, any individual. It will not be an easy road, but if you craft a clear vision, include your stakeholders, train like crazy, get your quick wins, and communicate like mad, you'll set the foundation for success. ☀



MELISSA SANTOS



USING PREDICTIVE TO BE PROACTIVE

MACHINE LEARNING 101

MACHINE LEARNING ISN'T A NEW CONCEPT. THE TERM WAS FIRST COINED IN 1959, WHEN COMPUTER GAMING PIONEER ARTHUR SAMUEL DESCRIBED IT AS A METHOD FOR GIVING "COMPUTERS THE ABILITY TO LEARN WITHOUT BEING EXPLICITLY PROGRAMMED." THIS IS STILL A FAIR DESCRIPTION TODAY.

What has changed in the almost six decades since the term was born, though, is how effective machine learning can be used by companies when engaging with customers. Predictive analytics is a powerful subfield of machine learning, and businesses that can accurately forecast the behavior of their contacts are in prime position to acquire, retain, and evangelize people.

There are three types of machine learning: supervised, unsupervised, and reinforcement. For marketers, the two main flavors tend to be supervised and unsupervised.

Unsupervised machine learning occurs when a system can freely determine patterns in data, with no specific target or goal informing the hunt for patterns. (In fact, it's perhaps best thought of not as a "hunt" and more as a "watch, wait, and see.")

This technique is probably most famous for fueling recommendation engines, since it can help customers discover brand-new products and can help businesses unlock non-obvious (and profitable) groupings. Let's focus on supervised machine learning.



BRITTANY COOMBS

Unlike unsupervised, supervised machine learning is searching for a specific answer—often looking to fill in a certain data point. Also unlike unsupervised, supervised machine learning is expected to yield an answer that is logical according to what the system already knows.

That's because in supervised, a business constructs a model with the information it has (called build data or training data), and that model matches people against patterns. So, if a part of a customer's digital story or demographic background is missing, the model can tell the business what data point probably fills that blank (or will fill it in the future).

There are two types of supervised machine learning: classification and regression. Classification occurs when the target answer is a descriptor or category; when the machine has learned enough about the customer (and the community they're part of) to classify them as Year-Round Shopper, for example, or Holiday Vacationer or Credit Card Maxer-Outer. Regression occurs when the target answer is a number value; when the question isn't "What kind of shopper is this person?" but rather, "In how many different months did they buy something?"

Let's say, for example, a clothing retailer wants to automate the first message it sends to people after they make their first purchase, and it wants to base that messaging on whether customers are likely to become Big Spenders or Little Spenders. (Not that machine learning is limited to binary outcomes. Anything but! Results can theoretically be infinite.) The retailer could make an algorithm based on several factors: age, location, money spent on that first purchase, if the person added a recommended item to the cart, and the amount of days the cart was abandoned. If the database knows the answers to all these questions, the model can match each customer to a pattern of behavior that signals Big Spender or Little Spender.

This example would qualify as the classification subtype of supervised machine learning, since the output was descriptive, not numerical. However, if the retailer wasn't segmenting by category but by number value—as in, not predicting if people become Big or Little Spenders, but estimating the lifetime value of purchases they'll make on the site—it would be a regression use case. It's not uncommon for classification and regression to be two sides of the same coin, or different angles of approaching the same core business question.

And again, don't let the word "predictive" enamor you to the future. The retailer in this example might already know someone's a Big Spender: they live in an alpha city, spent more than \$150 on their first purchase, bought at least one recommended item, and checked out same day. How old are they? Even if this data point is officially unknown, the algorithm could predict age if the other data aligns with a known pattern.

With the rise of automation and big data, machine learning plays a crucial role in marketing today. This post, of course, has only scratched the surface. But I hope it's made clearer the connection between segmentation and predictive. Good marketing isn't necessarily perfect, but it is proactive—and supervised machine learning helps that happen. ☺

As a subset of supervised machine learning, predictive lets companies use the data they already have to [a] guess other or unknown qualities about contacts that are probably true (present) and [b] guess how people will behave (future). This helps companies market proactively instead of reactively, which can increase people's interest from the get-go and boost your odds at converting. In other words, modern segmentation relies on predictive analytics, and prediction relies on supervised machine learning.



THE SECRETS TO MAKING BORING WRITING TOPICS SOUND INTERESTING

"MAKE IT SOUND SEXY." "I WANT THE WORDS TO REALLY JUMP OFF THE PAGE." "PEOPLE SHOULD REALLY BE EXCITED ABOUT OUR COMPANY WHEN THEY'RE DONE READING THIS."

Maybe you've heard something like that when you've been putting together your latest email, brochure, or company blog. In theory, those sound like semi-reasonable cliché requests to make for all of the creative writing you're doing at your company.

But what happens when you're not writing about topics that lend themselves to creative writing styles? What happens when your company is boring? GASPPP.

Did we just call your company boring? Yes. Don't leave just yet... it's okay if your company is boring. There are tons of boring companies and topics out there. And many of them need written promotion behind them. So, how do you make your boring topics sound interesting? Read on to find four simple steps to writing about boring topics.



ANDRIA KELZENBERG

STEP 1: IDENTIFY YOUR CUSTOMERS

No matter the topic (exciting or dull), you've got to understand your audience to establish a sense of trust and engagement. Is your customer the everyday end-user? Are they the leader who might purchase the product? Are they the person with expertise on your solution or topic? Are they technical in nature? Would they prefer laymen's terms? Do they respond well to infographics? These are good starter questions when you're trying to figure out who is receiving your content.

Think of the most boring thing you can think of. For me, it's watching paint dry. So, if I work for a company that sells a paint dryer, even though it's my nightmare to think about this product, for someone out there, it could make their job a heck of a lot easier. Find those customers and speak to them. They probably won't care as much about the bits and pieces that make up the paint dryer, but they will care that your product is going to help them do their job better or more efficiently. If my customer is the store who is going to stock my paint dryer on their shelves, they might care about different things.

They'll probably want to know more about how it's built and why it should take up valuable space on their shelves. Perhaps text that is brief, bulleted, or even visually mapped out would make more sense for those types of customers to quickly and effectively consume your content. Different customers are excited by different product/topic features. Identify their differences and speak to them.

STEP 2: KEEP IT LIGHT

Don't take yourself too seriously. Even serious topics don't have to be stiff. It's nice to know that there's a real person behind the solution or company. Start making your communication sound like it came from a person. If you're putting together a product manual, that might not be the appropriate time to stretch your creative muscles, but brief communications (like emails or social content) lend themselves to a more personal touch. Talk to the customer and encourage a dialogue when possible. If you consider yourself a bit of a comedian, throw in a joke or two, or perhaps a well-timed pun. Something that helps you stand out a little. More times than not, the recipient of your content has some familiarity with your topic and will appreciate a little personality in their content. Don't bore them with the nitty gritty details of what your product does every time you engage. Treat your customer like a person when you're connecting and maybe they'll become more engaged with your communications.

STEP 3: FIND THE INTERESTING STUFF

Not every person who works at a company is passionate about what the company they work for produces. I'm making an educated guess that not every person who works for the paint dryer company is obsessed with paint drying. But even the dullest of topics has something interesting. It might take a little digging or some competitor research to see how your product compares, but there is most definitely something that makes your product or company unique. Maybe your paint dryer is three times faster than competitors.

Maybe your customers rave about how great it is to work with your company. Maybe the handle on your product is easier to hold. Tell them. Don't ever make them guess what your product's differentiator is. Whatever it is, focus on your interesting quality and shout it from the rooftops. Make sure people know what makes you special and why they should care.

STEP 4: ACCEPT YOUR FATE AND ROLL WITH IT

Now for some bad news; sometimes boring products are just that, BORING. Maybe you have really strict legal limitations that don't give you much creative leeway. Perhaps your audience prefers a straight-forward, non-conversational tone when communicating with you. Unfortunately, some of that stuff is out of your control. All you can do is make the best out of the hand you're dealt. How do you make the best out of it? Make sure the content you're producing is the absolute best content available to your customers. Review your design aesthetic to ensure your layout makes sense for the recipient. Have you been using the same layout for 10 years? Maybe you consider switching it up. Do a thorough edit and assessment of the content you put together. Are there any areas that are repetitive? Could you tighten up your content anywhere? Are there opportunities to make it more scannable with lists or bullets? Could you add any helpful visuals to illustrate your point? Do your links lead to the most appropriate resource.

If you ask yourself those types of questions, I'm sure you'll find some opportunities to deliver the absolute BEST content to your customers, even if it does fall a little on the boring side.

When you're tasked with writing about boring topics, it can feel like there's no way out. But that doesn't always have to be the case. When you follow these four simple steps to writing about boring topics, your boring topics will start to jump off the page and speak to your readers in a whole new way. ■



FIVE TIPS TO GET STARTED WITH PERSONA MARKETING

MAKING A SHIFT TO PERSONA-BASED MARKETING IS A MAJOR UNDERTAKING: YOU'RE TRANSFORMING THE WAY YOU APPROACH YOUR PROSPECTS! ALTHOUGH IT WILL TAKE A WHILE TO GET ACCUSTOMED TO THE NEW MIND-SET, THE PROCESS DOESN'T HAVE TO BE MIND-BOGGLING.

Follow these five tips to ensure the persona marketing method won't drive you to madness.

1. PUT YOUR DATA TO WORK.

Before you start brainstorming with your team, take a look at your data: Who are the main contacts linked to closed sales opportunities? Which are tied to opportunities that didn't quite make it? Note the job titles, seniority levels, and departments for these contacts – they're in positions to make or break future sales. If your offerings (or your prospects' needs) vary by region, include location as a possible differentiator. These attributes will set the foundation for your personas.

2. KEEP IT SIMPLE.

It's tempting to go crazy on customization, but the law of diminishing returns definitely applies to persona marketing. Don't exhaust yourself with a dozen targets – focus your efforts on four or five persona types to get the ball rolling. Refer to your opportunity notes to determine who makes the decisions, and who drives those decisions. For example, your personas may break down into five categories below, each of them with a different reason for using your solution.

- Executive/C-Level
- Influencer
- Solution Implementer
- Procurement
- Daily User

3. USE YOUR REPS AS RESOURCES.

Ultimately, your goal is to get great leads to the sales team, so it only makes sense to get their input on your new effort. Find out what challenges come up when reps talk to prospects, and identify how you can remove those barriers before the marketing-to-sales handoff. Potential questions to ask your reps:

- What are the most common questions you get from prospects?
- Is there something you wish your prospects knew earlier in the buying process?

- Are there specific features of your offering that raise concerns for prospects?
- Are there features that are a strong selling point for a particular type of prospect?

4. FOCUS ON SOLUTIONS.

Although your segmentation looks at demographics, persona marketing messages are less about who they are and more about what they need. What problems are your personas trying to solve? Map out the questions each persona will ask as they consider your offering. For example:

- Solution Implementer – How does the solution fit into my existing framework?
- Procurement – What makes this solution a good value?
- Daily User – Does this solution make my tasks easier or more efficient?

5. LEVERAGE EXISTING CONTENT.

When you begin to think about persona-based marketing, don't assume you need a whole new set of assets. Evaluate the content you've used in product-based campaigns. It's likely those messages have already answered your personas' questions! So, figure out how to repackaging and use your existing content to highlight the messaging that appeals to each of your personas. Persona-based marketing is key to speaking to your prospects where they are – answering their questions before they even have to ask. It shows you know your audience and are not just sending out the message that you think everyone needs to hear. As we all know, it's all about trust. You're proving that your prospects can trust you immediately because you're focused in on their needs and how your solution meets that need.

Using these five tips will have a transformational effect on your marketing efforts and will help you better align with sales to close deals faster. Sounds like a win-win to me! ☺



LAURA MARTY



BEHOLD THE BUSINESS VALUE OF OMNI-CHANNEL ORCHESTRATION

IF YOU THINK OURS IS NOT AN OMNI-CHANNEL WORLD, THINK AGAIN.

The fact is we humans are using more and more channels to engage with everyone, including brands and marketers every single day.

Just consider these stats:

- 15 years ago the average consumer typically used two touch-points when buying an item and only 7% regularly used more than four. Today consumers use an average of almost six touch-points with nearly 50% regularly using more than four.
- 98% of Americans switch between devices in the same day.
- 90% of customers expect consistent interactions across channels.

THE GOOD NEWS, BAD NEWS AND BEST IN CLASS

The good news is nearly seven in 10 marketers deliver omni-channel conversations. The bad news is only three in 10 of these same marketers say they are either somewhat satisfied or fully satisfied with their ability to use data in marketing programs.

Aberdeen Group, who we partnered with to release an eBook which reveals the business value marketers derive by mastering orchestration of omni-channel marketing campaigns.

As for Best In Class, it should come as no surprise that the best marketers are nearly 40% more likely than others to have established an infrastructure to deliver omni-channel customer conversations.

In other words, these 40% get it; they understand that consumers are using many channels to engage and interact and they know they better be prepared to deliver on the promise AND the expectation of a seamless, omni-channel experience.

Findings from Aberdeen's CX study revealed that a leading group of organizations excel in managing customer experiences across digital channels such as email, web, mobile applications, and social media. Those are defined as "Best-in-Class" businesses.

Here's how these 40% look in comparison to other brands AKA their competition. (FIG. A)

Look at the disparities between best in class and all others. And pay very close attention to the chasm that exists when it comes to year-over-year change in annual company revenue.

While that looks like it's only 39 percentage points different (6% to 45%) it is in fact a 650% difference between those marketers who excel in meeting customer expectations and all others.

You can choose to ignore that stat at your own peril.

If this is something you're interested in exploring further, shoot over to www.relationshipone.com/Aberdeen-ebook to get the full report.



STEVE OLENSKI

TOP PERFORMERS EXCEL IN MEETING CUSTOMER EXPECTATIONS

	BEST-IN-CLASS	ALL OTHERS
CUSTOMER RETENTION RATE	85%	74%
YEAR-OVER-YEAR CHANGE IN ANNUAL COMPANY REVENUE	45%	6%
YEAR-OVER-YEAR CHANGE IN CUSTOMER SATISFACTION RATE	21%	3%
YEAR-OVER-YEAR IMPROVEMENT (DECREASE) IN RESPONSE TIME TO CUSTOMER REQUESTS	14%	4%
YEAR-OVER-YEAR CHANGE IN AVERAGE CUSTOMER PROFIT MARGIN	6%	-2%

(FIG. A)

HOW TO DEVELOP BRAND LOYALTY WITH MILLENNIALS

MILLENNIALS, OR PEOPLE BORN ROUGHLY BETWEEN 1980 AND 2000, ARE TOUGH CUSTOMERS—IN BOTH THE LITERAL AND PROVERBIAL SENSE.

These teenagers to 30-somethings are the opposite of their parents (typically Baby Boomers): They've foregone the traditional economic model in favor of a subscription-based economy, where hefty long-term commitments to a single product or service can be eschewed in favor of a customer-first model, where companies always have to reprove their value in a sea of digital competitors.

Millennials represent the modern customer. In the U.S. they wield over \$1 trillion in annual buying power. To convert and retain them, marketers must therefore meet them on their terms—understanding the subscription-based economy, its challenges, its causes, and its values.

'FLIXING THEIR MUSCLES

Earlier this year Netflix hit 100 million subscribers, finally eclipsing TV. No one seems to be talking about this, but it's a cultural milestone. The television era revolutionized marketing, so a shift away from it is meaningful. And it's probably not a coincidence that Netflix's numbers have been rising through the years in lockstep with millennials' growing financial power in the economy. In a recent survey, 92% of millennial respondents claimed to own a Netflix account.

Combine this with the popularity of other subscription services among the age group—Spotify comes to mind, as well as Amazon Prime—and there's

an interesting picture. Millennials are OK with basically renting a service or product, indefinitely. This means brands looking to inspire loyalty should show they can fill a need that will be there for a long time, and should show they can fill that need in a user-friendly and convenient way. A way that could, in theory, impress someone enough that they'd even be willing to pay a small fee for the next couple years.

MOTIVATIONS FOR SUBSCRIBING

Before we dive into how marketers can capitalize on the preference millennials have for subscribing, we should first understand why this preference exists in the first place. A lot of digital ink has already been spilled on the topic, but there are two major motivators: Millennials are skeptical consumers, and they have less financial freedom than generations past to make long-term investments in products and services.

On skepticism, Forbes put it best: Since millennials have been "bombed by advertising claims since they were in utero," they not only don't believe these claims "but are suspicious of companies that make them." This generation doesn't believe what marketers tell them about a product; they believe what their own research and judgment tells them. They conduct this research both before converting, through product reviews and crowdsourced opinion, and after converting, in a justified belief that in



a saturated market, a newer, more niche solution could be just around the corner. Brand names don't impress them. Actual bona fides do.

On wallet troubles, millennials do, bluntly, have less disposable income than their parents had at their age. A recent Federal Reserve report found they "earn 20% less than Boomers did at [the] same stage of life." There are many causes for this, including crippling student debt, an undersaturated job market, and the high cost of living in the cities that actually do have jobs. But for our purposes as marketers, we should simply understand (and respect) that subscription as a practice is both more common and more prudent the more limited a customer's funds are.

SOLUTIONS

All of this means that to convert the millennial customer, your marketing must showcase the three main values that work in a subscription-based economy: personalization, top of funnel education, and a multi-platform presence.

"MILLENNIALS REPRESENT THE MODERN CUSTOMER. IN THE U.S. THEY WIELD OVER \$1 TRILLION IN ANNUAL BUYING POWER."

PERSONALIZATION

The fact that millennials don't care about brand names can be a good thing for marketing teams that play their cards right. While this means that even the millennials who become customers may take longer to grow attached to your company, it also means millennials have an open-door policy. They are more likely in the first place to listen to your pitch, even if you are pitching from a brand they haven't heard of before. So, if marketers can get their foot in that door, the next key step is to deliver a personalized digital experience.

Most marketing automation tools (like Oracle Eloqua and Oracle Responsys), for example, enable workflows to be preemptively designed that account for all the meaningful actions a

contact can take, and then deliver a corresponding experience or start them on a related journey. For example, a common workflow recipe is to enroll people in educational nurtures (see below) if they've visited, say, five high-level pages (or just one or two deeply nested pages).



BRITTANY COOMBS

TOP OF FUNNEL EDUCATION

To overcome millennials' skepticism as customers, brands can inspire loyalty by educating them at the top of the funnel. Because this group doesn't want to be "sold to" by marketers, it's important for marketers to make millennials feel, well, not "sold to"—even though, of course, they're being sold to! Educating these customers early in the sales cycle serves multiple purposes and benefits both sides.

By providing people with content that proves values—a flow of two-pagers on core competencies, testimonials, case studies, collateral that quickly outlines competitive differentiators—companies show customers that they understand the decision-making power is in customers' hands. The tone of these educational efforts should be, "We want to tell you everything there is to know about our service or product, so you can make an informed decision." That's the tone millennials want, because ultimately they want to be able to independently review their options before making a personal, measured choice they believe in.

So, as long as your educational content is honest, it should align with whatever supplementary research millennial prospects undertake (googling, opinion-crowdsourcing, etc.) Knowledge is power. A better educated prospect is almost always a better customer: in this case, one who renews their subscription, as they received the service or product they thought they would.

MULTI-PLATFORM PRESENCE

It's important as marketers and organizations to learn how to be "mobile-first." The numbers don't lie: More than 85% of U.S. millennials own a smartphone (Nielsen), they interact with those smartphones up to 45 times every day (SDL), and "87% of millennials use between two and three tech devices at least once on a daily basis" (Forbes). In other words, any campaign that doesn't live simultaneously on multiple platforms is almost certainly not living up to its full conversion potential.

For brands looking to interest mobile millennials, this means two solutions are in order. First, web assets and emails need to use responsive design, so they can automatically present the optimal experience based on a customer's device. (Another good thing about responsive design: Google's algorithm rewards sites that are mobile-friendly with higher visibility in search results.)

Second, this carries implications for social media. Millennials are the most active customer group on Facebook, Twitter, YouTube, and Instagram, and social is most often accessed through mobile devices. Moreover, "62% of millennials say that if a brand engages with them on social networks, they are more likely to become a loyal customer."

Multi-platform thus means mobile. And if mobile means social media, that means that good, effective marketing campaigns can't be web-only—or even web-primary. They must be all inclusive: for different screen sizes, color capabilities, finger-touch sensitivities. They must be able to seamlessly transition from one device to another, and they must make a push on social media. Moreover, this means that a general brand presence on social media, whether connected to campaign or not, is important to cultivating millennials' trust.

IN CONCLUSION

Marketers who want to capture that most elusive beast these days—the heart of a millennial—must remember it's a subscriber's market out there. The Don Draper types don't hold the power anymore. Customers do, and millennials know this full-well. Their generational features have helped make a digital economy that thrives not on huge investment upfront, but on continual renewal that hopefully comes if brands can keep proving and reproving their value. Brands can do this by personalizing engagement, educating millennials with straightforward content, and ensuring their assets work across all digital platforms. ■



Deliver the Best of Your Brand

Every business focuses on the customer. But few actually deliver. Why? Because their digital marketing can't tell a compelling story. It lacks informed dialogue beyond the transaction. It's lost in translation because marketers don't speak code. And it's confusing when the data is disconnected.

Leading brands use our data-driven solutions for marketing automation, cross-channel marketing, content marketing, social marketing, data management, and testing and optimization. Now you can too. Create ideal customers. Deliver the best of your brand. Because that's how Modern Marketing works.

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MARKETING BOOKS + MARKETING GEEKS =
BEST BOOK CLUB EVER

Looking to increase your marketing knowledge with a good book? We've got a short list for you of books we think are worth the read. From ABM to change management to strategy, there's a wide variety of topics that you can use to beef up your marketing skills. This is not an extensive list but here are eight to get you started.





1. BLUE OCEAN STRATEGY

W. CHAN KIM

Blue Ocean Strategy is, you guessed it, a strategy book. Kim uses the analogy of red and blue oceans throughout the book – these are to represent the red waters that are bloodied with competition, and the clear blue ones that you can find if you diversify your strategy from others. This book will provide you with the tools you need to re-shape the way you think about strategy.



5. LEADING CHANGE

JOHN P. KOTTER

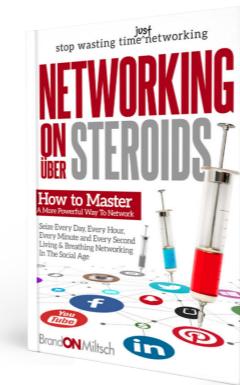
Whether it is welcome or not, change can be difficult, but John Kotter lays out an eight-step process to manage change. The best part? His change management process will give you positive results and is proven. After all, if the change isn't supported it will not have its intended effects. If you are in a leadership position, or aspire to hold a leadership role in the future, this book is a must-read.



2. COMPETING FOR CUSTOMERS:

WHY DELIVERING BUSINESS OUTCOMES IS CRITICAL IN THE CUSTOMER FIRST REVOLUTION
JEB DASTEEL, AMIR HARTMAN, CRAIG LEGRANDE

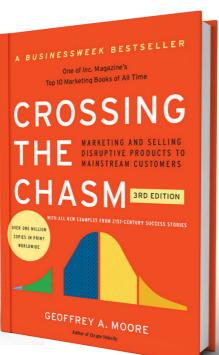
Technology has advanced over the years and so have customer expectations. Customers expect personalization, innovative products, and a seamless customer experience. How do we marketers stay relevant and competitive? Making customer success a central aspect of your organizational strategy. This book lays out three ways you can create that customer success and ensure you stay ahead of the changing landscape.



6. NETWORKING ON UBER STEROIDS:

HOW TO MASTER A MORE POWERFUL WAY TO NETWORK
BRANDON MILTSCH

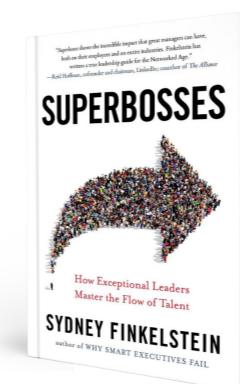
Networking isn't for everybody. Sure, it comes easy to some, but for many people it is cause for anxiety. With Miltsch's tips and tricks, not only can you master the art of networking, you can be an influencer. With numerous methods, you are sure to find success after reading this book. Get rid of that networking anxiety for good!



3. CROSSING THE CHASM

3RD EDITION: MARKETING AND SELLING DISRUPTIVE PRODUCTS TO MAINSTREAM CUSTOMERS
GEOFFREY MOORE

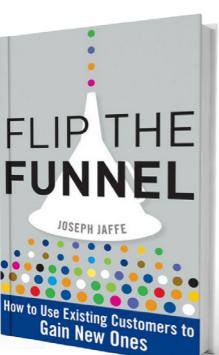
Our clients are looking to us for ways to adopt new technology and harness its power. Have you ever noticed that there is a major gap between those who take the leap of faith on new technology, and others who wait to make sure it will work first? This book explores the chasm that is the Technology Adoption Life Cycle and aims to provide readers with new insights and success/failure stories.



7. SUPERBOSSSES:

HOW EXCEPTIONAL LEADERS MASTER THE FLOW OF TALENT
SYDNEY FINKELSTEIN

Sydney Finkelstein spent 10 years researching executive leadership before writing this book – so you could say he's an expert. While there is variation among superbosses, they all have a few important traits in common. Read his book and find out what those are! (Oh, and did we mention Larry Ellison, CEO of our favorite tech partner Oracle is featured? Just the sugar on top of an already great book.)



FLIP THE FUNNEL:

HOW TO USE EXISTING CUSTOMERS TO GAIN NEW ONES
JOSEPH JAFFE

Joseph Jaffe has laid out a new "flipped funnel" model for customer service/customer retention in this book. He has found that to acquire a new customer is almost five to 10 times as expensive as simply nurturing relationships with those customers you already have. This book will give real-life examples to prove the success of this model, and should leave you convinced that you need an ABM model.



8. THE AGILE MARKETER:

TURNING CUSTOMER EXPERIENCE INTO YOUR COMPETITIVE ADVANTAGE
ROLAND SMART

When Roland Smart started his marketing career, he never would have thought that technology was such an instrumental part of marketing – they seemed so different! However, implementing technologies (albeit the right ones) is what will give your business the competitive advantage in today's world. This book will help you to better understand agile methods and how you can integrate those with your traditional marketing tactics.

MARKETING MUNCHIES

Our snacks and drinks are the perfect pairing to fuel your marketing ideas. After a long day at the office, you'll be looking forward to these treats to help you re-charge and stay inspired. To all you strategists, designers, developers, and communication experts, don't hesitate.

Get Cooking!

OPEN WORLD PUNCH

This light and refreshing cocktail is out of this world.

- 1 OZ CURACAO, BLUE
- 1 OZ PEACH SCHNAPPS
- 2 OZ VODKA
- 6 OZ SPRITE
- ICE

MODERN MARKETING MANHATTAN

Geek out with this classic cocktail.

- 1 DASH ANGOSTURA BITTERS
- 1 CAPFUL DRY VERMOUTH
- 1 CAPFUL SWEET VERMOUTH
- 3 OZ WHISKEY
- 2 MARASCHINO CHERRIES

BEST-EVER BROWNIES

Ingredients:

- 1/2 CUP UNSALTED BUTTER, MELTED
- 1 TABLESPOON VEGETABLE OIL
- 1 1/8 CUP GRANULATED SUGAR
- 2 LARGE EGGS
- 2 TEASPOONS PURE VANILLA EXTRACT
- 1/2 CUP ALL PURPOSE FLOUR
- 1/2 CUP UNSWEETENED COCOA POWDER
- 1/4 TEASPOON SALT

DIRECTIONS

1. Preheat oven to 350°F.
2. Lightly grease an 8-inch square baking pan with cooking oil spray.
3. Combine melted butter, oil and sugar together in a medium-sized bowl. Whisk well for about a minute. Add the eggs and vanilla; beat another minute.
4. Sift in flour, cocoa powder, and salt. Gently fold the dry ingredients into the wet ingredients until JUST combined.
5. Pour batter into prepared pan, smoothing the top out evenly. Top with a scatter of chocolate chips.
6. Bake for 20-25 minutes.



LIBBY JACOBY

SPICED-UP PRETZELS

Ingredients:

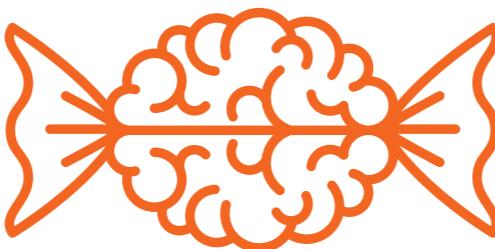
- 4 CUPS THIN PRETZEL STICKS
- 3 TABLESPOONS HONEY
- 2 TEASPOONS BUTTER, MELTED
- 1 TEASPOON ONION POWDER
- 1 TEASPOON CHILI POWDER

DIRECTIONS

1. Line a large pan with foil. Spray the foil with cooking spray.
2. Place pretzels in a large bowl.
3. In a small bowl, combine honey, butter, onion powder, and chili powder. Pour over pretzels and toss to coat evenly.
4. Spread pretzels in prepared pan. Bake at 350°F for 8 minutes, stirring once.
5. Cool on a piece of parchment or wax paper, stirring several times to keep separated.



BRAIN CANDY



DIRECTIONS: UHH, IT'S A WORD FIND. FIND THE WORDS.

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A	V	T	E	V	U	W	C	K	Y	P	A	V	R	Y
U	P	P	R	Y	C	L	O	U	D	R	R	Q	Y	E
T	A	V	T	M	O	D	E	R	N	B	K	L	M	O
J	E	G	I	G	S	Q	R	E	L	D	E	L	O	C
A	U	W	F	J	A	Q	T	O	M	A	T	I	O	N
F	Z	V	I	V	D	I	Y	A	N	E	I	W	F	S
I	A	C	E	Q	K	K	V	Y	O	S	N	K	I	R
N	D	C	D	H	P	Y	S	F	E	G	G	R	B	M
T	P	O	N	E	J	V	R	O	B	B	G	Y	S	M
E	A	R	O	J	J	U	N	R	C	L	C	Y	Y	K
G	R	A	W	K	K	S	F	Z	U	R	J	R	J	O
R	T	C	O	J	J	A	C	M	V	E	V	Y	H	D
A	N	L	R	E	W	N	P	C	K	B	X	O	B	T
T	E	E	L	C	I	Q	O	O	A	D	D	D	U	Z
I	R	T	D	R	I	E	E	N	I	M	B	U	O	R
O	X	H	A	R	F	R	E	S	P	O	N	S	Y	S
N	G	U	J	H	M	Y	S	U	P	K	E	I	L	Z
V	C	Z	L	R	I	P	E	L	O	Q	U	A	E	Y
N	H	Y	J	C	K	E	Z	T	W	X	A	U	D	T
K	A	Z	M	A	X	Y	M	I	S	E	R	Z	Y	B
S	R	E	L	A	T	I	O	N	S	H	I	P	A	S
N	E	Y	C	D	V	A	U	G	O	P	E	N	P	V
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O	D	A	P	P	C	L	O	U	D	R	W	A	F	R



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