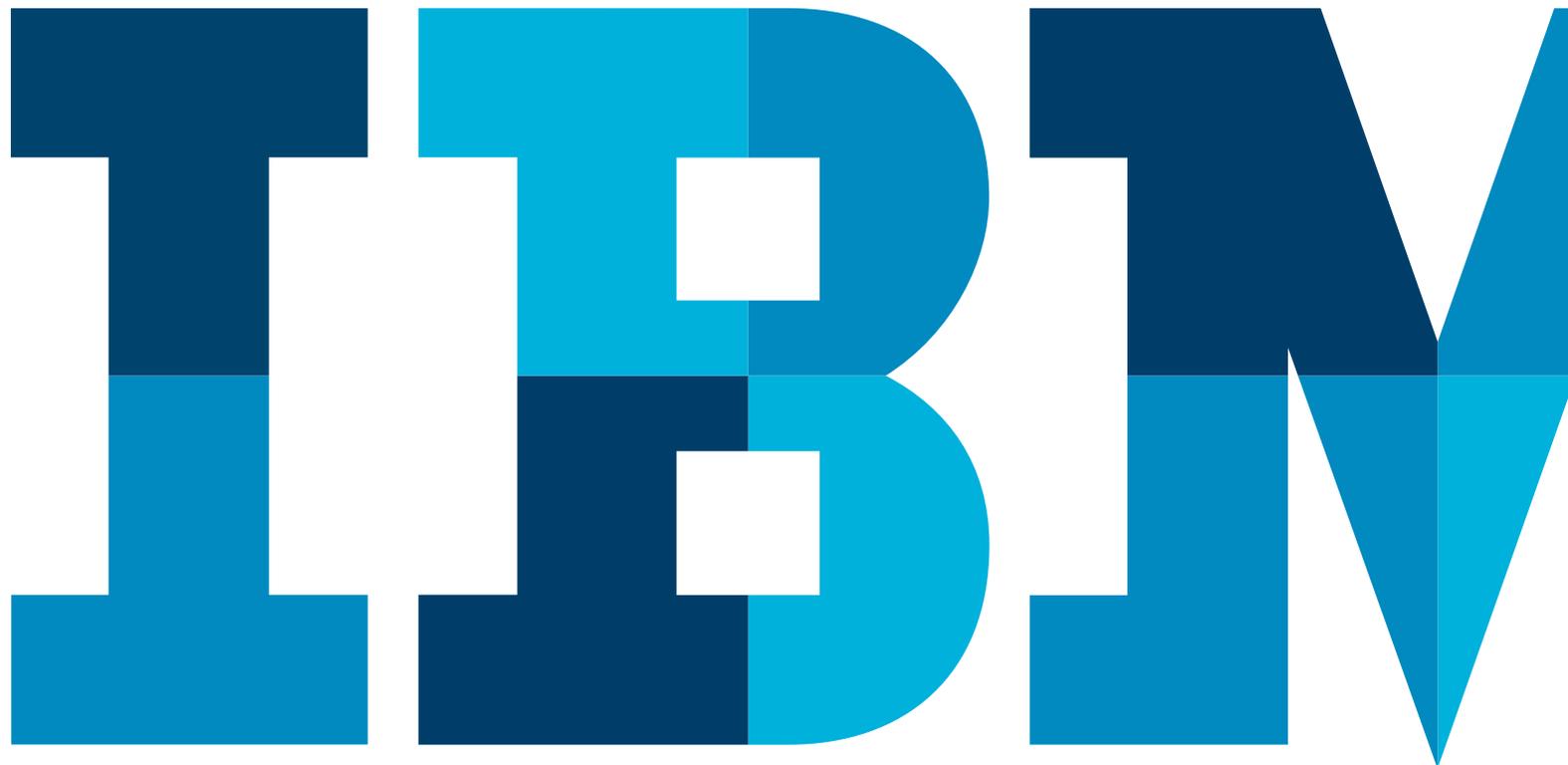# Creating real-time individualized campaigns around virtually every imaginable buyer behavior

Learn how to deliver cross-channel communications tailored to each person in your database

IBM

Creating real-time individualized campaigns around virtually every imaginable buyer behavior

The explosion of communication channels and devices during the last five years has opened up exciting ways for marketers to interact with people – as well as new challenges. Today, customers and prospects are telling businesses all sorts of things about themselves and their interests through the actions they take on these different channels.

However, these same customers and prospects are also increasingly intolerant of irrelevant content that adds to the messaging clutter piling up in these new channels. And with the vast majority of people exposed to thousands of advertisements and marketing messages each day, can you blame them?

In this landscape, the critical question for marketers becomes, "Are you equipped to capture your customers' and prospects' behaviors and use them to connect at an individual level that not only cuts through the noise, but actually reduces it?"

Of course, many marketers have already been leveraging email behaviors – such as whether an individual opens an email or clicks through on a link – in some capacity. And more recently, savvy marketers have been using web tracking technology to capture individual website behaviors that can provide valuable data about contacts based on the pages they navigate. Gathering email and web behaviors gives you a solid foundation for engaging contacts more strongly, but the reality is that customers and prospects are interacting well beyond your website and emails – mobile apps, social media, SMS, check-ins and, of course, offline. Consider: More than 80 percent of consumers today are using social, local and mobile technologies to do some combination of browsing, researching and buying products.[1]

The future of marketing, then, lies in finding a way to capture and connect across multiple channels with relevant content in a timely fashion. And one of the ways to achieve this is by embracing behavioral marketing – combining an individual's behaviors with marketing automation. A recent Forrester Research study revealed that mature practitioners of behavioral marketing were 29 percent more likely to grow revenue faster than plan than other marketers.[2]

While mastering behavioral marketing requires a well-thought-out combination of technology, vision and skills, the most critical elements are often a unified master database and a powerful interaction engine. This white paper will talk about each and the role they play in behavioral marketing automation. It will also look at how you can use behavioral marketing technologies, such as IBM Marketing Cloud Universal Behaviors, to deliver cross-channel, real-time communications tailored to each individual in your database.

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Section 1:

Building your foundation - the importance of a unified master database

When you consider that your marketing programs are only as good as the data you use to power them, it is easy to see why the database is one of the most valuable assets for today's marketers. But with the ever-increasing number of communication platforms, processing all this data is a challenge: Less than half of today's businesses capture and consolidate customer behavioral data from multiple channels in a single database.[3]

Because the channels contain disconnected silos of interactions, it has been difficult for marketers to create a quality customer experience. Consider a few of the undesirable scenarios that can result from fragmented or missing data:

- Before opting in to your email program, a customer surfs the golf clubs section of your website on multiple occasions. Your first post-opt-in message touts your sale on soccer gear.
- A biking enthusiast downloads your mobile app and tells you he enjoys long-distance mountain biking. The next time he visits your website, it proudly displays your new line of city bikes.

- A prospect retweets your new blog post, then gets an automated email from you offering a demo. Problem is, he is already in the nine-month nurture because he told you his existing contract will not expire until next year.
- A customer purchases a steel refrigerator, then gets an email a few weeks later with the subject line, "Tired of steel refrigerators?"
- A new boater comes in to test ride the latest personal watercraft and provides her cell phone number. Two months later, she gets a text message alerting her to a special offer on your new 30-foot cruisers.

Five ways to move to a unified master database

In addition to implementing a flexible keys database, here are five ways to enhance your data:

1) Consider the various ways that your customers are interacting with you. As we move toward "smart data" fueled by "universal behaviors," each action by a customer or prospect across channels – email, web, social, SMS, CRM, mobile apps, check-ins, etc. – should be looked at as having the potential to trigger an automated communication or piece of content.

2) Determine what data would enhance the customer experience. Based on what you found in No. 1, begin prioritizing the importance of these pieces of data, depending on which types of information would be most helpful in improving the customer experience. This will help you down the road as you are deciding where to begin in your move toward building a revitalized database.

3) Think about how you might capture and integrate this data. Is it just a matter of adding some code or turning a feature on? Or do you need to upgrade or invest in a new technology? What process changes and integrations do you need to take to break down the silos? To capture a contact's cross-platform activity and build a three-dimensional digital identity, you will need a plan.

4) Look at outside experts that can append additional data to your records. In some cases, there may be gaps in your data that third-party experts can help fill without draining precious resources from your team, enabling you to transform the customer experience more quickly and effectively than you could on your own.

5) Consider other external sources of data. There may be pieces of data – interest rates or weather temperatures, for example – that are out of reach for your organization but could be helpful in delivering more relevant content. A custom technology integration would enable you to tap this data and serve up related content.

You get the point: Siloed lists and/or data parts will likely leave your marketing efforts disjointed and your customers dissatisfied. In contrast, a unified master database will provide the foundation that allows you to listen to the behaviors of each and every customer across various channels, and then interact and respond on the appropriate channel.

To do so, your database must be connected to your most important channels and systems, enabling you to pull in behaviors via email, website, social, SMS and mobile apps – and then reflect these actions in a timely fashion. Since today's marketing database manages virtually everything you know about each customer, it also needs to be scalable, flexible and easy to administer.

Despite the benefits of a unified master database, many companies are still focusing their resources on increasing the number of people on their email list, with can lead to database shortcomings such as:

- Failure to incorporate key behaviors
- Lack of integrations with CRM system, e-commerce platform, product catalog data, support data, etc.
- Empty data fields (or fields populated with old data)
- "One-off" lists separate from central database

While growing your master database is important, quality is just as important as quantity when it comes to driving additional engagement and revenue.

So, how can you start moving toward a unified, behavior-driven database? There are many steps you can take to improve your data (see sidebar on p. 3), but one of the most critical is moving to a flexible keys paradigm. What does this mean? Well, traditionally

marketing databases have required the presence of a specific field – usually an email address – before a business can start collecting data on an individual.

The problem is that in a multichannel world, customers often start a relationship with your company via your website, social media page or mobile app. By not constraining your database around a particular field, you can store your social relationships right next to your email subscribers, who are intermixed with your web visitors and mobile app users – some of whom may be synced with your billing or CRM system. As the relationship with each person progresses, new keys are added to their identity, allowing you to connect the virtual dots and associate even more behaviors with each profile.

This approach helps your more quickly decipher customers' "single identities," connecting the dots so you can recognize that the person on your website watching the video is the same customer who retweeted the pictures of your product announcement last week – and the same person who previously searched for "running shoes" but has not been back to purchase.

The ability to put these virtual puzzle pieces together has become increasingly critical in a world in which your customers may start the day reading about your latest offers on their smartphones and end it making purchases on their laptops. Simply put, you need your platform to work cross-device and cross-platform, connecting each customer touch point into a single view.

"The Power of Flexible Keys and Single Identity"

View the video >>>

Section 2:

Putting your data into action – the benefits of a powerful interaction engine

Collecting buckets of customer and prospect data is great, but can you act on it? And, more importantly, can you act on it in a timely fashion when your product or service is top of mind?

Traditional cross-channel marketing – if it is attempted at all – has involved manually pulling data, searching for matches to whatever rules the company was using to include or exclude contacts, and then manually sending a message. In addition to taking valuable time, this process has had two major drawbacks:

- Because of the gaps between when data was collected and when the related communications were sent, messages were rarely delivered at the time when contacts were most engaged.
- Because the process was impossible to scale on an individual basis, it made it harder to deliver highly relevant content.

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Using a marketing automation platform that features a powerful interaction engine can help overcome these challenges. As your customers explore your website, drop items in shopping carts and cross geofences to enter your stores, it is the interaction engine that makes the platform responsive in real time – or, if you prefer, at whatever time in the future the contact meets the criteria you have set up.

Here is how it works: With a behavioral marketing automation platform, you can set up sophisticated business logic that determines what types of content a contact sees based on the rules you establish. Maybe you set up customized content in your email, in your mobile app or on your website that changes based on how a contact has interacted with you across various channels. Or, an action might trigger an immediate SMS, email or even a print mailing. Or, you might build a program that would listen for behaviors and react on different channels at different times, depending on whether a contact's "score" passed a certain threshold – or dropped below it.

Whatever the business logic you decide on, the interaction engine can drive personal content Whatever the business logic you decide on, the interaction engine can drive personal content experiences for your contacts via email, SMS, your website, your mobile app and more. So if a customer has recently shown heightened interest in a particular offering on your website or unlocked some new rewards, that content can prominently appear the next day when they engage on your mobile app or be delivered in an email a few minutes later to bring them back to purchase.

Amazing as it is, automation is really the key to setting up and scaling these remarkably personalized, real-time messages. And the beauty of this approach is that once you have set the rules, the platform does the heavy lifting for you, listening for customer and prospect cues, interpreting them based on the rules you have put into place, and responding appropriately. All while you are working on something entirely different – or, better yet, relaxing at home.

Universal Behavior Exchange

Many marketers are eager to deliver more timely, personalized content to their customers, but face an array of barriers preventing them from doing so. In an effort to help marketers improve their return on relationship. In an effort to help marketers improve their return on relationship, IBM set out to build a framework in IBM Marketing Clould that would allow marketers to listen and understand behaviors occurring from virtually any touch point – social, paid media, in the store, on the Web, at the kiosk, in the mobile app, CRM and even at the geofence – and use these dynamic buyer behaviors to trigger personalized, cross-channel messaging in real time.

The result is Universal Behavior Exchange, which gives marketers access to a stream of real-time behaviors that you can easily understand and instantly integrate into highly relevant individualized campaigns. Universal Behavior Exchange is an innovative solution that allows marketers to listen to the interactions of their customers on a wide set of channels, bring these behaviors in a relevant format into their core marketing platform in real time, process them against business rules, determine if that person needs a message back, and respond in the customer's channel of choice.

Section 3:

Five cross-channel, individualized, real-time marketing ideas

Once you combine a unified marketing database with an automated interaction engine, you are limited only by your imagination when it comes to delivering real-time, cross-channel messaging for each individual in your database. So, how can you take this exciting functionality and apply it in the real world?

As you might guess, the possibilities are as endless as the ways your contacts interact with you. And while the channels you focus on and the messaging you deliver will vary based on the industry you are in and the products or services you offer, here are five cross-channel messaging examples, enabled by IBM's Universal Behavior Exchange capability, functionality, to give you some ideas for how you might apply these tenets to your marketing:

IDEA #1: Instead of doing nothing or sending a generic message when a contact retweets your new product announcement, you respond immediately based on where the person is in the buying cycle.

Channels Involved:

Barriers to implementation
Typically, with most platforms, this approach would require manually watching for those retweets and adding contacts in your email marketing database to a program or mailing. As an alternative, you could have a system that finds those "tweets" and enriches them with marketing identity, but then you would still need to export them, import them to the marketing platform and then send out the email. Either way, manual interaction would be required by someone in the marketing and possibly IT organization, and the process just does not scale easily.

Connecting the dots
With the right technology in place, your Twitter monitoring application can be integrated to pipe these events into your marketing platform in real time based on rules you establish instead of manual interaction.

Consider a scenario in which a brand new prospect and an existing customer both retweet your product announcement. Knowing where they are in the buying cycle, you respond differently. The brand new prospect might be sent a "contact us to get your demo" message (you could set up rules to exclude those who had already received a demo), while the existing customer might receive links to resources that enable him to get the most value out of this product, such as a recorded webinar and an article that talks about 10 key new features.

Email   Twitter   Location   SMS   Website   Mobile App   Shopping Cart   Physical Store/Offline

IDEA #2: Rather than doing nothing or delivering a message at a later date when a customer crosses a geofence around the perimeter of one of your stores, you send that person a real-time text message that treats him or her as an individual rather than just another random visitor.

Channels involved:

Barriers to implementation
Geofencing is fairly new, and existing technology has been focused on the experience in the location app rather than on integrations that would enable real-time, automated interactions in other channels.

Connecting the dots
By enabling you to capture this location data (for customers who have opted in) and immediately feed it into a centralized master database, a behavioral marketing automation platform allows you to complement the work of your in-store staff by sending a timely, personalized SMS text to arriving (or exiting)

customers. Consider, for example, how sending the following two customers different messages would help you connect more strongly:

- Allison rarely visits your store and has not been back for a while. Upon arrival, you send her a product-targeted text aimed at getting her to buy something.
- Vanessa is a rewards club member who frequently visits your store. You send her a "welcome back" text recognizing her status as a loyal customer and reminding her that she can redeem her rewards points today.

IDEA #3: When people abandon shopping carts on your website before completing purchases, instead of waiting a day (or longer) to respond, you send these individuals cart recovery emails before they shut off their computers.

Channels involved:

Barriers to implementation
In the typical scenario today, you have to run a daily batch of abandoned shopping carts, load that data into relational tables and run queries to determine if anyone in your database has an abandoned shopping cart that would make them a candidate for a cart recovery email.

Connecting the dots
Rather than waiting 24 hours for a bulk feed of cart abandonment data to show up in your marketing platform, and then sending an email to those abandoners, you can now capture this behavior the moment a customer ends his or her session and initiate your cart recovery efforts in minutes via email, SMS, the Web or phone. Given the SeeWhy study that showed that a real-time remarketing message generated 105 percent more revenue than the same email sent only 24 hours later, it is easy to see how this shift to real time is a game-changer.[4]

In addition to the timeliness element, an integrated marketing platform enables you to add logic into your cart recovery emails based on the recipient's previous behaviors. Maybe the person who abandoned and has not purchased in six months gets a discount incentive, while someone who purchases every week just gets a service-oriented reminder.

IDEA #4: When someone who previously downloaded your mobile app later surfs your website via his desktop computer, you show that person content that reflects his or engagement with your mobile app, rather than displaying generic copy.

Channels involved:

Barriers to implementation
Short of an account-driven system requiring custom development, marketers have not had a tool that could link mobile app interactions with web tracking data. The behaviors have been stuck in silos, with no way to connect the mobile user to the desktop web browser.

Connecting the dots
Now companies can store data in a single customer view rather than it being siloed by channel or segment. With this "single identity" the marketing platform understands that the mobile app user and the web user are the same person, allowing you to deliver a more consistent experience across channels.

Depending on your mobile app, for example, user behaviors in the app may signal what the contact is interested in. So, maybe you build dynamic content blocks on your website so that a person who spent time looking at product X on your app sees similar content the next time he visits your site.

What about the 26 percent of people who download an app and never use it again?[5] Just by knowing who is starting to disengage with your app, you can use email to drive them back again, perhaps sending an "app reengagement" message outlining tips for getting the most out of your app to those downloaders who go three months without opening.

IDEA #5: When someone comes into your store to test or inquire about a high-ticket product, you send that person an email in minutes with helpful post-demo information on that specific item.

Channels involved:

Barriers to implementation
There has not been an easy way to tie proprietary in-store systems (POS, sales software, etc.) into a real-time behavioral platform. And in the rare cases when companies do pool this data together, it is usually done on a nightly batch basis, creating a gap between the customer/prospect action and the company response.

Connecting the Dots
By implementing the correct marketing solution, you can capture all the rich details from an in-store system and feed them into your unified marketing database in real-time, enabling you to trigger a message on the channel of your choice based on this information.

For example, a car dealership rep could enter a prospective buyer's email address and the details of what he drove, and that action would trigger your marketing platform to send an email in minutes personalized with information on the test model. A similar scenario could take place at a trade show booth, with the prospect entering data via an iPad app that is synced up with a centralized database.

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Conclusion

Today's empowered buyers are demanding a new level of attention from businesses, but many marketers are struggling to scale the type of personalized messaging that their customers and prospects crave. To make matters more complicated, marketers must connect across multiple channels, a challenge that has proven daunting, with customers in one recent study citing cross-channel inconsistency as their No. 1 complaint.[6]

Yet the effort can pay off in engagement and ROI. By harnessing the power of behavioral marketing automation to help you move beyond generic mass mailings and broad segmentation and start communicating to "audiences of one" in real time, you can deliver the type of amazing multichannel customer experiences your contacts will remember.

And with only 17 percent of marketers currently classifying themselves as mature practitioners of behavioral marketing[7], this is the perfect time to gain a competitive advantage by working more behavior-driven, cross-channel content into your messaging stream.

About IBM

IBM is a global technology and innovation company headquartered in Armonk, NY. It is the largest technology and consulting employer in the world, with more than 400,000 employees serving clients in 170 countries.

About IBM Marketing Solutions

IBM Marketing Solutions make it easier to design and analyze meaningful customer experiences across applications, devices and time. From omnichannel marketing to real time personalization to lead management, IBM's offerings provide a range of solutions that help marketing organizations develop timely, relevant and responsive communications and collaborate more efficiently. The solutions can address a broad range of customer requirements, from simpler single channel campaigns to the most complex environments needing advanced segmentation capabilities, and include multiple deployment options. To learn more about the IBM Marketing Solutions visit ibm.com/marketing or contact your IBM representative or IBM Business Partner.

About IBM Marketing Cloud

IBM Marketing Cloud, part of the IBM Marketing Solutions portfolio, powers the delivery of exceptional experiences for customers across the buyer journey by leveraging customer data and behaviors, providing analytical insights and automating relevant cross-channel interactions. The cloud-based digital marketing platform provides email marketing, lead management and mobile engagement functionality to inform and drive personalized interactions in real time. To find out more, please contact IBM Marketing Cloud at 1-866-745-8767 or +44 20 7202 5930 and visit ibmmarketingcloud.com.

Footnotes

1 IBM, Greater expectations: *"Consumers are asking for tomorrow, today,"* March 2014 , http://bridgesgi.com/wp-content/uploads/2014/10/Bridge-Solutions-Greater-Expectations.pdf

2 Forrester Consulting, *"Use Behavioral Marketing to Up the Ante in the Age of the Customer,"* May 2013, http://www.arga.net/downloads/Use_Behavioral_Marketing.pdf

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