EMAKINA

AN EPAM COMPANY

User-driven Marketing Automation

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Introduction

Get more from your marketing automation

If we define marketing automation as any kind of technology that allows a business to target customers through automated marketing messages, it makes sense to only discuss technology in this whitepaper.

However, marketing automation is about so much more—with potential that remains largely untapped. According to a Gartner Survey, marketers only use 58% of their martech stack's potential. Why? Because marketing automation is about more than tech.

It's about delivering powerful user experiences on all possible touchpoints of a consumer journey.

That could mean supporting sales by increasing lead generation; or helping users to make choices through upsell techniques like product recommendations; or increasing relevancy by creating a 1:1 user-driven lifecycle journey— servicing the right experience at the right moment, in a personalised way.

It can help you segment your audiences for social media campaigns (targeting or retargeting) and help you to deeper understand a huge audience through data gathering, scoring and segmentation.

Even though all of this can be automated, it doesn't mean it is effortless.
In fact, it's becoming harder and harder each year to use marketing automation technology **effectively**.

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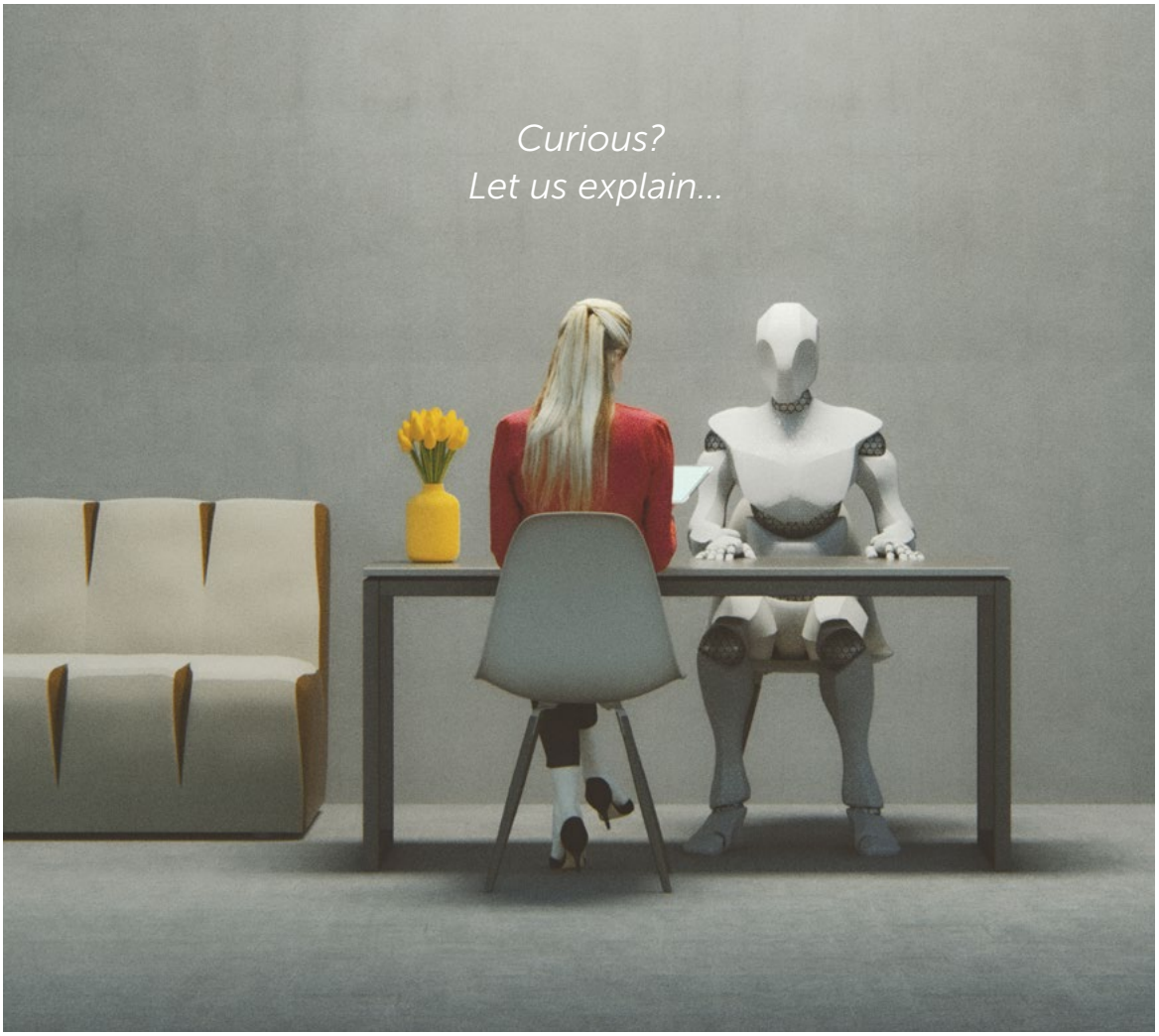
What has changed?

The answer is simple: the pandemic has completely changed the way we shop online. We've seen a digital shift happen where our behaviour is much more connected to technology.

Marketing automation follows these trends, and it may have become more complex for marketers to determine which challenges to deal with first.

There are different levels of maturity when it comes to marketing automation, and you need to get to the next one before your competition does. Especially post-pandemic, you don't want to be forgotten by users just because you didn't meet their expectations or follow their new lifestyle.

The good news? Read on and you can gauge what level of marketing automation you're currently on, what level is next, and what it will take to get there.



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It all starts with the user

Do you feel like user expectations are increasing to the point of being unreasonable, that your users expect a level of personalisation that your team simply can't provide yet?

That your carefully crafted welcome and re-engagement campaigns are no longer doing what they're supposed to do?

Customer expectations are higher than ever before. As digital becomes more sophisticated, users are expecting brand interactions to be seamless, customised, and engaging. Users are less tolerant with brands that don't fit their expectations like other companies do. They will compare your brand with others who build meaningful relationships at each stage of the customer journey.

Only 32% of companies consider marketing automation "very successful" at achieving their important goals.

Three Deep & Ascend2

So where does this increasing difficulty come from?

To be honest, it's not you... it's your users.

Why? Because their expectations are shifting. Every single day they are exposed to more marketing automation efforts from other companies. Their inboxes overflow with emails – not to mention their spam and deleted folders. They lose themselves blind scrolling through endless content. Every day, it becomes trickier to capture their attention and deliver personalised content that cater to their expectations.

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84% of customers say being treated like a person, not a number, is very important to winning their business.

Salesforce Research

Some brands do better than others in terms of open rate, time spent on page, CTR (click-through-rate), conversion, etc.

But let's face it: it's the best-in-class companies that set the bar for user expectations, and they do that by using more than one marketing automation tactic. It goes without saying that if you're still doing marketing automation like you did five years ago, your users will be disappointed.

56% of customers actively seek to buy from the most innovative companies – those that consistently introduce new products and services based on customer needs and new technology.

Salesforce Research

If someone else sends your user a series of personal, funny, and beautifully designed messages that speaks to them on an emotional level at the exact right moment, why would they settle for less from you?

The next question is easy:

How do we fix this? How do we answer the demanding user expectations through marketing automation?

Spoiler:

The answer is user-driven marketing automation.

We'll tell you all about it, but before we can look at a solution, we first need to acknowledge that there is a problem.

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Is your marketing automation strategy outdated?

It's a hard pill to swallow but it's the truth: you can't create a marketing automation strategy once and be done with it.

Take the example of a birthday email. We've all had them in the past, over and over again. But is this birthday email still relevant? Don't you think users know by now that it's automated? There is actually very little value in it for them.

> *7% of customers have stopped buying from a company because a competitor provided a better experience.*
>
> *Salesforce Research*

Universal welcome messages, abandoned cart emails and happy birthday coupons have become the norm. Everyone's doing it, and some still have success with it, but it's not a guarantee any longer. Because when traditional marketing automation is used to grab attention and drive users further and faster down the funnel, it might not provide the user the value they were looking for. **That's why it was originally called sales automation.**

The difference may seem rather subtle but what if, instead of a first email with a core message like this, you rethink the content to come across more like this:

One is a promise of more content that will be delivered; the other is asking what kind of content the reader would like to get. But although subtle on the surface, the different strategies that drive these options are worlds apart.

The first one is the classic one

telling the user what they can expect and then delivering on that promise, hoping that they will remain interested right till the end. This is called the inside-out approach.

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The second one is the user-centric one

Trying to figure out the needs of your users so you can deliver content that feels personal and provides a solution for them. Content that can help them take the next step or solve a problem with ease.

The first one is **KPI-driven marketing automation**. The driving force behind the messages are thoughts like "*I want more website traffic*", "*I want to upsell more*", "*I want more customers going to my store*".

The second one is **user-driven marketing automation**. This one is driven by one single thought: "*I want to use data-insights to serve each customer with a more relevant, more tailored experience.*"

As you can probably guess by now, the first strategy is slowly becoming outdated. The era of brands deciding what customers get without tailoring it to their specific needs and wants, is coming to an end.

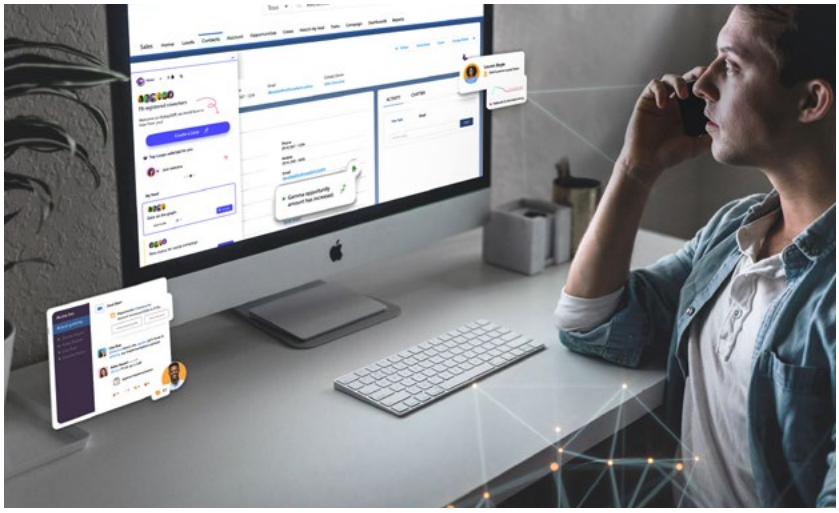
The new era is personalised!

As **personalisation** is currently a buzzword, there are all kinds of definitions out there. Here, we obviously mean more than adding a user's name to a message.

We mean deeply understanding them so you can get them what they want, where they want it, how they want it, exactly when it's needed.

Sounds too good to be true?

Well, that depends on the current maturity level of the personalisation in your marketing automation plan...



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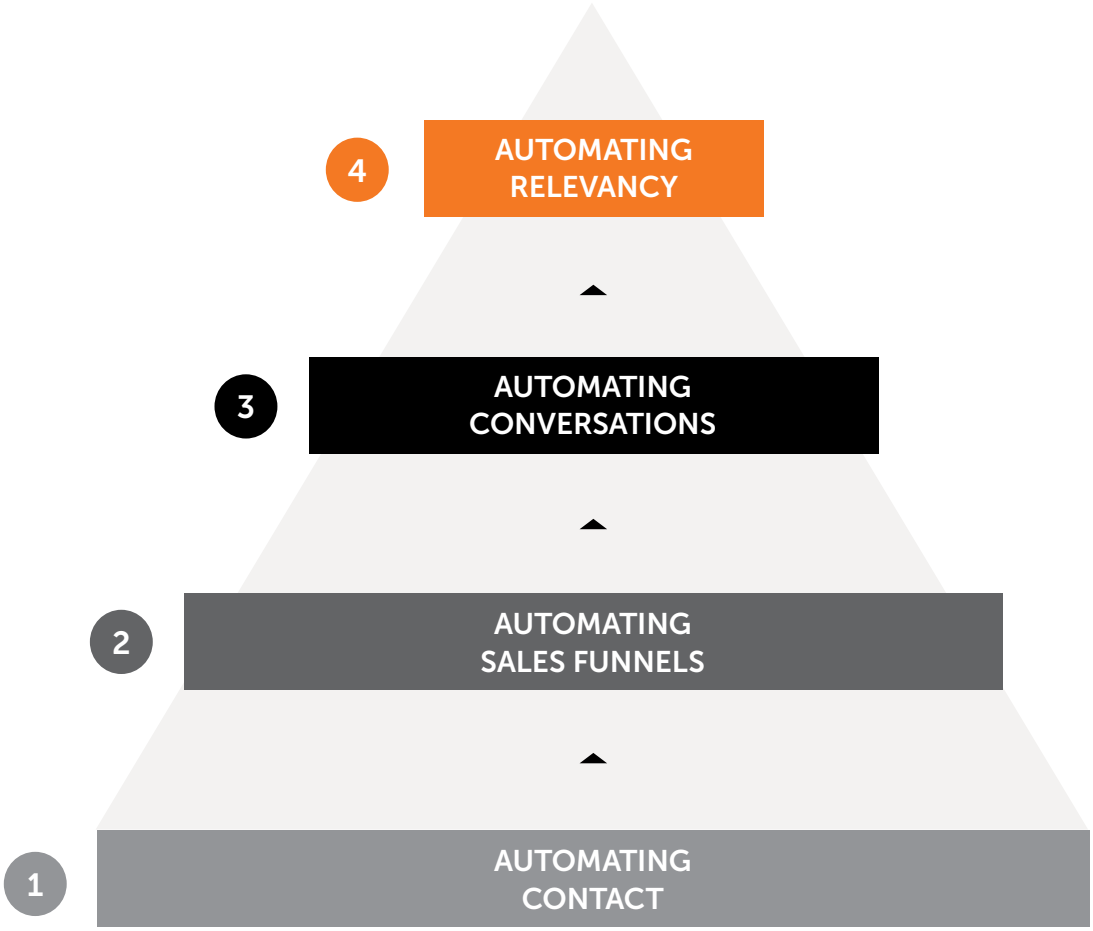
How mature is the personalisation in your current marketing automation?

*Did we say **levels**? Yes, we did. In 2022 we work with four levels. We expect more levels to come into existence as technology evolves and user needs become even more deeply understood.*



MATURITY LEVELS

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MATURITY LEVELS

1 Automating contact

This level is also called one-to-many or blast communication. It's where you use automation tools to simplify the process of reaching out to new or existing customers with content you think they would like to hear about. It starts from an inside-out point of view and is the replacement of a personal phone call, sent from one source to many recipients who all get the same message.

2 Automating personalised contact on multiple channels

Previously known as sales automation, this is when you gather limited data to talk to users in the hopes of pushing them down the sales funnel.

An example would be sending them abandoned-cart or order confirmation messages. This limited data is usually a combination of declarative data (my name is... I am ... years old, I have ... kids) and additional data collected when they interact with owned brand touchpoints—visit your website, buy from your webshop, or use your loyalty card to collect extra points.

The only source for all this data is your own sources and touchpoints that you own and manage. The data you collect here allows for triggered conversations –a 'reaction' to a user's action—rather than randomly initiated ones. In terms of personalisation, it is one step up from the mass communication in level 1.

3 Automating needs anticipation

Using multi-source data, now you aim to keep conversations going with users within an ecosystem of touchpoints. This means going beyond triggers that give an idea of what the user does, where and how often.

This higher level of personalisation is achieved by combining data about past interactions from owned sources with those from elsewhere (trends, social channels, ads clicked, search history, etc) to anticipate user behaviour. The goal is to keep the conversation going, no longer pushing your message to your users but optimising your touchpoint ecosystem to keep the conversation going with proactive content. This is also known as the **always-on approach**.

4 Improving the user experience

Here the brand no longer waits for a trigger or for the user to do something before getting in touch. With big data and smart data analysis, a brand can deeply understand user behaviour and spot data patterns that helps to anticipate needs and pro-actively offer solutions before problems arise.

The goals is to make the funnel disappear altogether by offering the most relevant content, at exactly the right time and with exactly the right solution for that specific user's situation. The goal is to continuously improve the ongoing conversation, help users move through the user journey, provide them with solutions, and optimise each user's experience.

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This last level gets the closest to the actual core of **advertising**. You are giving users a reason to build a personal relation with your brand, remain loyal to your products/services and become ambassadors.

Level 4 gets the closest to reaching this goal by managing an ecosystem of touchpoints to always offer users the most relevant content. Most importantly, it provides additional services, answers their needs, wants and desires the moment they arise.

Why should a company reach level 4?

The simple answer? Let's call it the Amazon-effect or the Netflix-effect.

Companies like Amazon and Netflix are already operating at level 4, and their users are your users too. What they get there in terms of user experience, they expect from you as well. Selligent refers to it as the **Unreasonable Customer**. Users are prepared to give you their data because they expect an amazing experience in return. Fail them, and you will not get their business.

Are buyer expectations shaping purchase behaviour?

Percentage of shoppers who agree with the following:

See "State of the Connected Customer" report for more

So, we can all agree that users expect great experiences from your brand.

Yet perhaps the difference between a level 3 experience and a level 4 one isn't entirely clear? **No problem.**

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Say you sell face cream

If you're at level 3, you predict that it's going to be winter soon and your user's specific skin type will need different care. You put up a flow about adapting a personal skincare routine with products that are perfect for this particular skin type.

However, wouldn't it be great to have a tool for users to scan their skin every single day to get recommendations tailored to their skin type, the weather, hormones, late nights, etc?

Say you sell holiday packages

If you're level 3, you know where your users went on their holiday last year. So, you put up a flow at the exact moment the user started browsing for a holiday the previous year.

However, wouldn't it be even better to have a tool that gives users recommendations based on data-driven science? Sciences that measure where your users are most likely to go? So, you directly propose offers to a specific region for this next travel according to a user's budget, interests, etc. items from the look they love?

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Say you sell hamburgers

If you're at level 3, you know that some users come in every Friday between 7:00 and 7:30 p.m. to order a burger with curly fries and mayonnaise. So you send them a coupon at lunchtime to get a free ice cream for desert.

However, wouldn't it be great to have technology that makes recommendations for other dishes on the menu based on your user's tastes (e.g. gluten-free, low fat), which opens up more possibilities for upselling?

Say you sell fashion

If you're at level 3 you know your user bought a certain pair of trousers, so you target them with ads of t-shirts and sneakers that would go nicely with them. Fashion combinations that are currently worn by their preferred Instagram influencers, of course.

But, imagine you had mirrors in store that remember those trousers and use facial recognition and VR to show matching tops, sweaters and jewellery next time they visit?

And wouldn't it be awesome, if the user buys one of those recommended looks, that you offer them a 'maintain-the-look' subscription that automatically sends them packages with more items from the look they love?

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Conclusion

If you read this whitepaper to find out what's next in marketing automation, the answer is clear.

Users will be increasingly demanding with higher expectations when it comes to personalisation, pushing you to get the most out of your marketing automation toolbox.

We have currently defined four levels of personalisation in marketing automation—level 4 is where your customers expect your business to go next.

Wondering if you're there yet?

Take our simple User-driven Maturity Test on the next page.

All you have to do is answer 5 simple questions about personalization.

At the end, you'll immediately discover what level your company is on. What are you waiting for? It takes only a minute to take the test below and find out the answer!

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User-driven Maturity Test

Test how user-driven your marketing automation is.
Simply answer our 5 questions below. For each question, note the number of your answer as a score (answer 1 gives you 1 point, answer 2 gives you 2 points, etc.). At the end of the questionnaire, you can find your result — including a prognosis of the status of your Marketing Automation Maturity. Don't like the result? Just give us a call, we'd love to help you get to the next level!

01

Putting the user at the centre of your communication mostly happens:

- ■ With data from registration: clients and non-clients receive different communication, personalised with their first name.
- ● By working with segments: segment A receives different communication than segment B or C.
- ▲ Based on a combination of a user's self-declared interest and their tracked behaviour—e.g. what they bought, if they opened emails, or where they clicked on a website.
- ◆ By predicting the purchase behaviour and providing services matched to the customer, we can increase the Customer Lifetime Value of each user—it's our Holy Grail!

02

The data we use in marketing automation mostly comes from:

- ■ The registrations we collect on our website or during offline events.
- ● Our preference centre, where customers can save their communication preferences, and we can see sales data, channel preferences and profile data combined into one 'customer view'.
- ▲ The above, plus click behaviour from emails and on our websites. We use this information to give each profile Customer Lifetime Value-scores.
- ◆ Anywhere we can accumulate it, and then we let our data experts distil the relevant triggers, scores, trends and anomalies to feed our marketing efforts with insights.

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03

The communication we send consists mostly of:

- ■ Email newsletters that highlight our products and services.
- ● Promotional and transactional emails. Occasionally we integrate SMS into the mix.
- ▲ Promotional and transactional emails. From these emails we extract data that we use for specific targeting on social media. We also have an app and think about integrating notifications to the journey.
- ◆ 1:1 e-mails or push notifications, plus targeting on social media. Even communication on the website is personalised based on a client's profile (Last project was assuring a unique customer view and marketing automation in our POS/Shop).

04

We know the value of marketing automation because we measure:

- ■ The results of our emails: deliverability, open rate, click-to-open-rate, number of unsubscribes, ...
- ● The results of our emails over time: we see where the results improve but we also see where we need to take action.
- ▲ Web, store and sales results of our campaigns and actions. Every campaign is its own business case, and we evaluate it regularly.
- ◆ Both the current and potential long-term value of each client. This allows us to target the right campaigns to the right users and attribute the right investment to each person.

05

Our marketing automation happens with:

- ■ A marketing tool that allows us to send personalised emails.
- ● A marketing automation platform, but I feel we're not using it to its full potential.
- ▲ A marketing automation platform that allows us to personalise communication on all digital channels. It's connected to a dashboard where we can see our return on investment (business cases).
- ◆ A marketing automation platform that allows us to personalize communication on ALL digital channels, connected to a dashboard where we can see our ROI and business intelligence from our BI platform, which allows us to score better based on all available data.

Congratulations, you completed the test! Now, discover the maturity level of marketing automation in your company on the next page...

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YOU HAVE MOSTLY ANSWERED

■ ## Your are on level 1: Automating contact

Let's be crystal clear: modern marketing has much more to offer than classic email marketing, so there is a lot of untapped potential in your business! Of course, we know there are plenty of obstacles to get stuck at this level: you don't yet have the right tool, you took over this project from another colleague, you don't get the best support from your agency, you still need to get management buy-in before you can progress .... No worries, doing this short test was a first step towards the solution! Next thing is to contact us so we can work together to help your business grow.

● ## Your are on level 2: Automating funnels

You make sure your customers receive the communication that interest them. You might also have a clear view on the results of your campaign. But do know that the competition is still a level (or even 2) ahead of you?

The next step is creating a marketing automation roadmap that lays out the different steps to increase the long-term value of marketing automation in your business. A map with plenty of quick wins to progressively see the improving trends over time. A map that also steps you up from only focussing on short term wins while creating a view on how to reach long-term growth. And you know what? At Emakina, we are used to help our clients build this roadmap. Let us show you how we partner with clients.

▲ ## You are on level 3: Automating conversations

You are on level 3: **automating conversations**. Lovely! You are using multi-source data to have on-going conversations with users within an ecosystem of touchpoints. Be proud about that and be sure to keep your focus on short- as well as long-term growth, and on growing business value from your marketing automation efforts.

However, are you sure you are relevant on all touchpoints in today's and tomorrow's user journey? And is every (relevant) step in your production process automated, so you have your hands free to fully focus on improvements or on aligning with a strategist? Sometimes all you need is a sparring partner that frees you from the hassle, and assures you stay inspired and focused on the right future. Of course, Emakina has a team of strategists available to keep you focused and inspired...

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Your are on level 4: Improving the User Experience

Congratulations!

You're really on top of it and thinking future-proof. Consumers today may be entitled, but you are clearly focusing on being a meaningful brand, creating impactful stories in the journey of your users. That is why you are ahead of the curve and why we'd love to meet for a chat about your excellent marketing automation approach.

Authors

Maarten De Neve

Marketing Automation Practice Lead

Maarten is a digital strategist and consultant with a clear passion for Marketing Automation, CRM and digital communication. He has 15 years of overall experience in digital marketing and communication, of which 12 years on the agency side (BBDO, Strategie, DDB and Emakina). He is devoted to improving brand experiences by creating remarkable, data-driven stories relevant a brand's consumer, delivering LT-results for each business.

Yasmine Ait Maskour

Marketing Automation Strategist

Yasmine is a digital strategist passionate about helping brands craft their digital roadmaps through marketing automation and CRM. She believes that unique businesses deserves unique strategies for unique users. She is devoted to creating seamless user experiences that wins users' hearts.

Sarah Claeys

Storytelling Manager

Sarah helps international brands tell compelling stories to its users. She does so by combining deep user insights with content strategy, editorial support and coaching. She works with clients across the global portfolio of Emakina.

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Do you need help?

At Emakina, we understand how important marketing automation is and our goal is to delight our clients users everywhere. Want to upgrade your digital experiences? Our teams are ready to help you level up.

Our **marketing automation team** will help you ensure that the User Experience of your brand feels personal, and remains consistent across all touchpoints for every user. Whether you're taking your first steps in digital experiences or already familiar, our teams would love to support you.

Marketing automation

Who is Emakina?

Emakina is a digital agency with global reach. It is part of Emakina Group, an agency network uniting more than 1,100 talents in 18 countries. Marketing and technology experts work in concert with their clients to grow their business and brand value. Together, they gain the necessary user insights to develop highly effective strategies and creations. These include cutting-edge applications, websites, e-commerce projects, impactful content and campaigns.

As ambassadors for users, Emakina places user expectations and requirements at the heart of any project. This approach ensures our clients delight their leaders: the consumers of the digital age.

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EMAKINA

The User Agency

The ultimate digital brand experience for your users

Team up with our marketing automation experts
to start designing the brand experience your users dream of.

Start your journey with us.

Contact

Maarten De Neve

Marketing Automation
Practice Lead

mdn@emakina.com

www.emakina.com

Feel free to contact us

Emakina Europe

Rue Middelbourg 64a
1170 Watermael-Boitsfort
Belgium

+32 2 400 40 00
think@emakina.com

Emakina Middle East

FZ-LLC Office #909,
9th floor, DSC Tower,
Studio City Dubai,
United Arab Emirates

+97 4 589 57 22
info@emakina.ae

Emakina North America

79 Madison Avenue
New York, NY 10016
USA

+1 866 499 9591
info@emakina.com