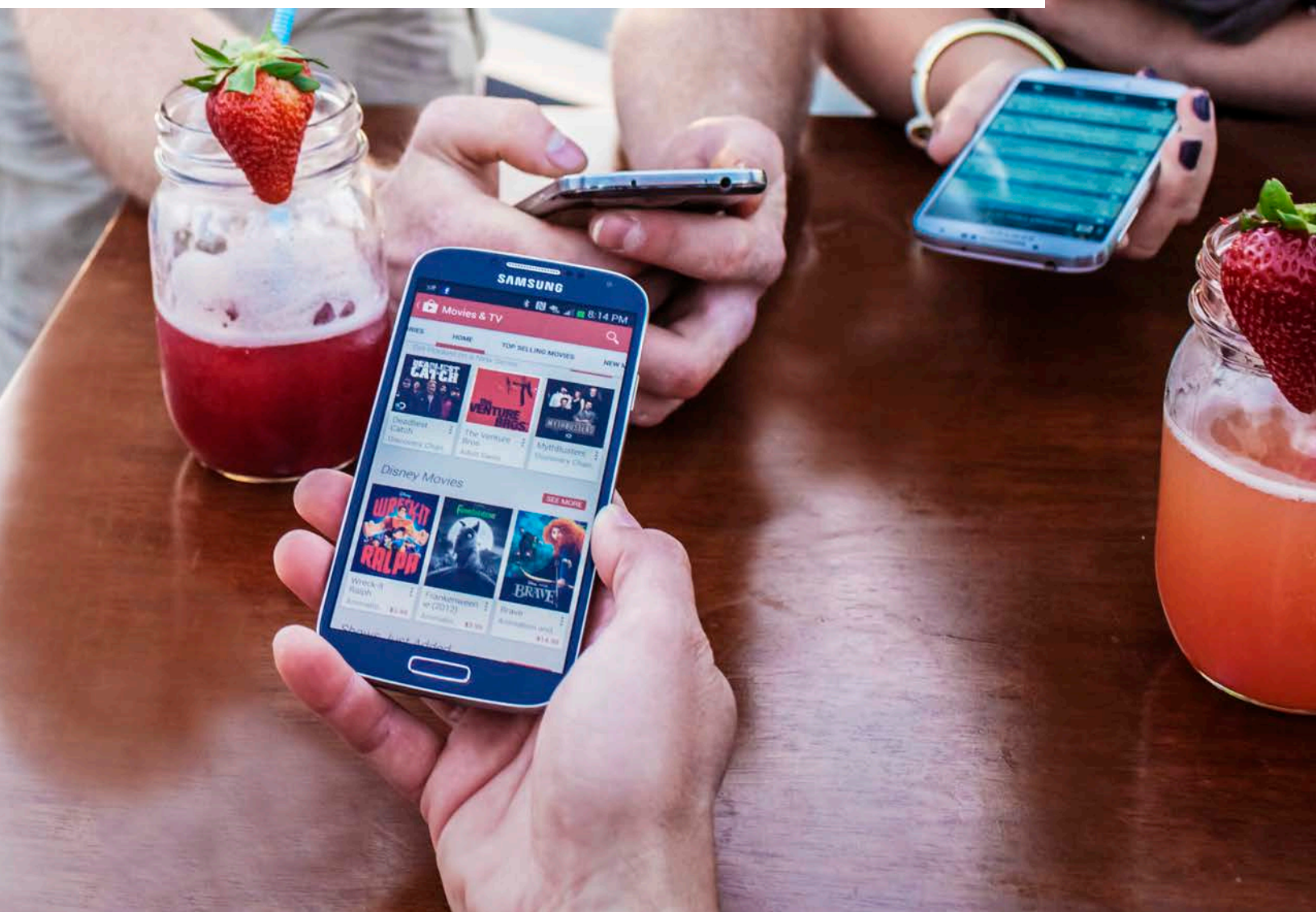# HOW TECHNOLOGY MARKETERS
CAN BETTER ENGAGE CUSTOMERS

For CMOs of technology organizations that want to build more meaningful customer relationships.

WELCOME

As marketers, we frequently have to adapt to industry and customer shifts. This is especially true in the technology sector, where constant innovation is the name of the game. With more empowered customers and other significant disruptions, there is a movement by marketers to be more insightful and to drive deeper engagement with their audiences.

In this paper we have outlined best practices for technology marketers to follow that will help them deal with these challenges.

After reading this paper you should be able to:

- Identify and understand customer groups that will grow your business

- Determine the most impactful ways to engage with your audiences

- Organize your team to effectively drive customers through a seamless journey

- Become an insight-driven organization, re-injecting intelligence into your business

- Maximize revenue and loyalty with your marketing programs

I hope this paper helps you to address your challenges and create deeper customer engagement.

Tammy Soares
EVP,
Rosetta West

TABLE OF CONTENTS

WHY DOES CUSTOMER ENGAGEMENT MATTER?

There are several challenges highly prevalent in the technology sector that make the CMOs job particularly difficult, all of which we think can be best addressed by putting the customer at the center of the business and building more engaging experiences across every product, marketing and customer service touch point.

The greatest challenges include:

01. **The pace of change and number of new product entrants** in the technology sector makes it challenging to create a memorable and differentiated product launch, and makes understanding your competitors' next move a constant struggle. Brands that find ways to engage with their customers on an ongoing basis can build more meaningful relationships, making it easier to counter competitive threats and determine what products and programs will resonate.

*Examples of new products announced in early 2014 from Sony, Samsung and LG.*

02. **Disruptive business models and a resurgent focus on customer experience** are forcing all technology brands to rethink how they go to market, better understand their customers' needs and fight harder for customer attention via more engaging total customer experiences.

Examples of disruptive brands focused on customer experience. Forrester Research reports a correlation between quality of customer experience and brand loyalty.

WHY DOES CUSTOMER ENGAGEMENT MATTER?

03. **New communication channels and shifts in how people buy** means all marketers are reevaluating where and how they interact with their best customers. The attitude has shifted from "being everywhere" to focusing on the moments when your customers want to engage with you and the ones that have the most positive impact on conversions or building relationships.
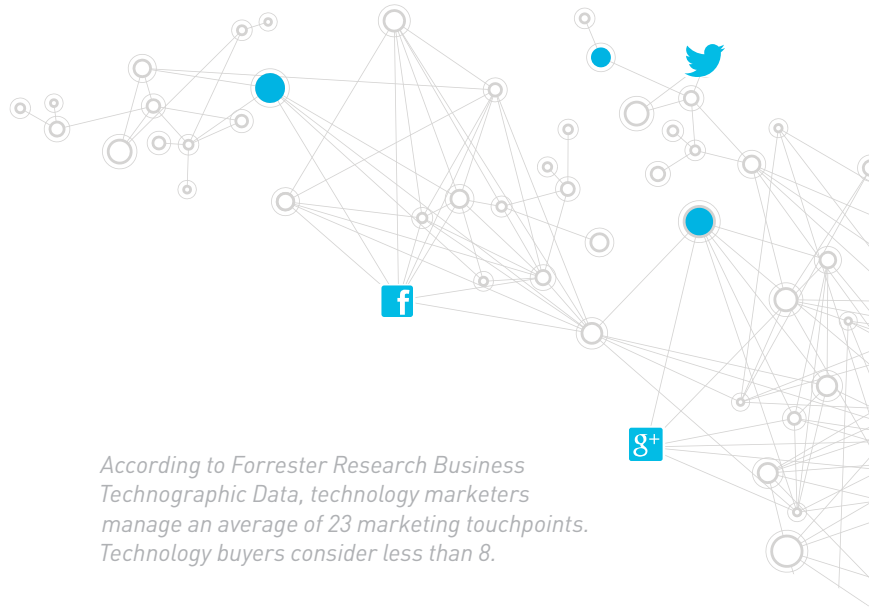
According to Forrester Research Business Technographic Data, technology marketers manage an average of 23 marketing touchpoints. Technology buyers consider less than 8.

04. **Customer expectations are higher and switching costs for hardware and software are lower,** placing more focus on customer retention. As a result, technology brands that once relied on "locking in" customers are finding innovative ways to improve marketing, sales and support experiences to keep customers happy and loyal.

63% of mobile subscribers who have had a negative interaction would take action—lodging complaints, cancelling service and telling people they knew about it.**

The frequent shifts in customer and market dynamics means only the brands with the ability to consistently engage their customers with relevant content at the right moments will win. A focus on engagement helps CMOs learn from customers, establish ongoing relationships and ensure that when the time comes to make a purchase, it's easy for their audience to choose their product.

**"What's Critical In The Telecommunications Vertical", CMO Council Study, http://www.cmo.com/articles/2012/9/17/a-lesson-in-loyalty-from-mobile-phone-subscribers.html

When brands deliver relevant, personalized content at the right moment, it's no longer an intrusion, but a benefit.

As a result, we have seen leaders in customer engagement acquire more customers, keep them loyal and continually build value over time. For one device manufacturer, we saw a 9% increase in customer satisfaction, significant increase in retention and tens of millions of dollars of incremental revenue. For another technology client selling a subscription-based service, we have seen a 15% increase in retention and 31% increase in revenue from upgrades.

Leaders in engagement typically share a common set of attributes. They are:

01. Customer-centric, with decisions at all levels of the organization made and rewarded based on how they will ultimately impact the customer.

02. Insight-driven, constantly capturing the right customer data. This requires the ability to build a 360 view of customers via survey data, social media, customer interactions and cross-channel behavioral data, as well as the know-how to manage and pull insight from it.

03. Personal, leveraging data to make all marketing programs and brand experiences more engaging.

04. Seamless, with every interaction across marketing and product being smooth and connected.

05. Customer lifecycle-oriented, and looking along the entire continuum of how someone buys and uses the product, then meeting needs at each point. This extends beyond the point of transaction or conversion and is a continuous evolution.

06. Always optimizing, bringing together analytics data from all customer touch points to find ways to build more meaningful relationships and greater customer value.

07. Constantly innovating, as a result of the influx of knowledge gained about what customers want and how well their business is serving those needs. Data sparks great ideas and a focus on customer delight fosters investments in new innovative solutions that might drive deeper engagement.

THE LEADERS IN CUSTOMER ENGAGEMENT

Here are a couple of brands doing a good job engaging customers:

LinkedIn

LinkedIn captures a tremendous amount of data about users, which informs personalized notifications, emails about relevant jobs, suggested reading materials from big-name authors and a wide range of highly engaging content. Their focus on adding value to users has helped drive steady increases in site engagement and revenue every quarter over the last several years.

Communications from LinkedIn are informed by actions you have taken on the site or based on your professional network.

Intel

Like many technology businesses, Intel has many product lines and audience types. They have repeatedly found innovative ways to engage with business customers and directly with consumers by portraying a simple message to the market and their willingness to try new things to generate truly compelling content. Their collaboration with will.i.am as part of their Ultrabook Project campaign is a prime example. The custom content created as part of the program highlighted product features in an interesting way and encouraged participation from individuals across the globe in each city will.i.am made a tour stop.

will.i.am produced custom music tracks that represented each city in his global tour using an Intel-powered Ultrabook device. The compelling content and social integration powered ongoing engagement with potential customers.

CREATING MORE ENGAGING EXPERIENCES

As a leading customer engagement agency, Rosetta has a defined process for creating customer engagement that drives audiences towards purchase and loyalty. We break the process into three stages—Identify, Engage and Activate. Throughout the rest of this paper you will learn how to apply this to your own business.

Our proven approach has driven substantial business improvements for many clients and has been validated by our ranking by Forrester as a Strong Performer in their Q4 2012 Customer Engagement Agency Wave.

IDENTIFY

Identify and understand your target:

- Segments that best align with your brand promise and market growth potential

- Needs, attitudes and channel preferences that distinguish each target segment

- Purchase influencers and the path to purchase

ENGAGE

Engage customers:

- Across their pre- and post-purchase journey by delivering highly relevant products, content and experiences at the critical moments that matter to customers

- On a more personal level after they have interacted in any way with your business, continually learning and refining touch points

ACTIVATE

Activate relationships:

- With a seamlessly integrated brand and commerce experience

- By leveraging the personal connection with existing customers to drive repurchase and help turn them into loyal advocates

IDENTIFY

Creating industry leading and highly impacftul marketing programs requires a good understanding of your customer to help focus your entire organization. The most critical questions to answer to align your business are, "Which customers matter most?" and, "How can we win with them?" The following steps will help answer these questions and provide your organization with insight that aligns all areas of the business around the greatest market opportunities.

STEP 01 DESIGN A SEGMENTATION APPROACH THAT IDENTIFIES YOUR MOST VALUABLE CUSTOMER

Customer data can be segmented in many ways, including by demographics, psychographics, behaviors and motivations. In our experience, the "right way" combines the best of several types of data, including needs, attitudes, behaviors, motivations, demographics and psychographics. Together these inputs help to paint a picture of "Why?" a consumer behaves a particular way, which ultimately helps make segmentation data more actionable for marketers.

To get the most out of the combination of data points, we need to understand which of these things drive decision-making and purchase in the sector you are interested in. Once we have that, we are able to put the data points together to form meaningful segments that relate to a customer value metric like sales or average price.

Drawbacks to many of the individual methods for collecting data by themselves include:

- Looking only at demographics doesn't give you a full picture of the customer and may be too one-dimensional.

- Insights based only on demographics or psychographics are good for mass advertising but don't give enough category insight to make business decisions, evaluate investments and ensure you can hit your business objectives.

- Many behavioral-based models have limited ability to distinguish between similar-looking people (high value, high churn) with different needs and motivations. These also tend to drive lots of lift early on, but quickly decline in additional upside as each incremental investment sees diminishing ROI.

IDENTIFY AND UNDERSTAND THE TARGET

While demographics or psychographics may not have the closest link to business objectives, they can still be powerful tools for starting to understand the brand, the market and customers as we try to highlight core attributes in the leadup to a full segmentation.

	Segment 1	Segment 2
Age	16-24	18-24
Gender	75% male	60% female
Data Usage	Heavy	Moderate to Heavy
App Usage	Games, Social	Productivity, Business, Social
Buying Behaviors	Buys devices about every 9 months. Buys top-tier data package.	Buys every 18 months. Buys accessories like headset and chargers. Buy unlimited minutes and mid-tier data package.
Purchase Drivers	Latest and greatest	How well the device works with others
Loyalty Drivers	Ecosystem and content tied to the device "Cool Factor"	Reliability Positive brand experience Customer Support
Media Channels	Web, Display, Search, TV, Mobile	Social, TV, Radio, Display

Figure 1: This visual illustrates two sample segments for a wireless service provider, which combines several types of data. and starts to paint a picture of why each segment behaves a particular way.

STEP 02 MAP SEGMENTS TO YOUR BUSINESS OBJECTIVES TO IDENTIFY THE ONES WORTH FOCUSING ON

The process of defining business objectives should occur prior to the segmentation process, as they will influence the type of data you would collect. However, as you uncover customer segment value and motivations, it is possible that goals will shift as new opportunities are identified. Once you have finalized the objectives, you can hone in on which segment adds the most value to your business.

We frequently see CMOs going after aspirational targets or a premium target, which in many cases is not the audience opportunity that aligns best with their product proposition or will allow them to accomplish their business growth objectives. To determine "value," you must understand in detail your segment's size and revenue potential, marketing acquisition costs, your brand's performance with the segment, and the segment's value as brand advocates to others. This type of data allows you to identify the segment that will make the best target because of their beliefs and willingness to engage, as well as their revenue potential or other business value. Using this approach for one software manufacturer, Rosetta was able to hone in on the small business segments representing a disproportional amount of revenue and create campaign messaging that tripled open rates for acquisition emails.

In Figure 1 above, if our objective is long-term growth, segment 2 is likely the best target. While they may have a higher cost of acquisition, it's likely that segment 2 will remain more loyal to the "tried and true" brand than segment 1, who is a big spender on data but is always looking for the next hot device.

STEP 03 UNDERSTAND EVERYTHING ABOUT HOW YOUR IDEAL SEGMENT BUYS AND USES YOUR PRODUCT

Information about your segments is most valuable in the context of how they investigate, consider, decide, buy and use your product. Now that you have segmentation data, and have honed in on the segment(s) of greatest business value, it's time to get more granular and map out the specific channels they use, their needs at each touch point and the thought process along the way. It's also important to go beyond the purchase and map out actual product usage to get a sense of the audience purchase drivers.

Ask Friends in Person

Visit Store to Use and Make Purchase

Ask Friends via Facebook

Compare on Manufacturer Website

Search on Web

Check Pricing on Carrier Website

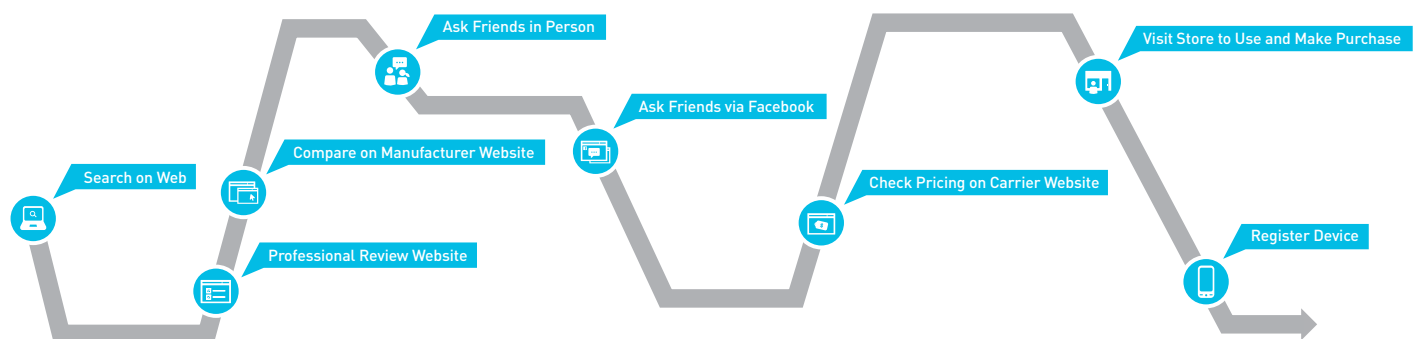Register Device

Professional Review Website

Figure 2: This sample purchase journey for a smartphone shows each touch point a customer has with the brand. Needs at each point dictate the message and content areas to focus on.

STEP 04 DETERMINE THE MOST INFLUENTIAL MOMENTS THAT MATTER MOST TO YOUR CUSTOMERS

Along the customer journey, evaluate which touch points most influence their decisions and locate the "leakage points" where target customers start to move away from your brand. The moments that matter most will differ for any given product. For example, for a newer device in an emerging category, the in-store experience will be critical in lowering purchase barriers. If it's important for your potential customer to understand how a product would fit into their life and they go to your website to do that, a lack of relevant lifestyle content on your site might be the "leakage point" influencing that visitor to move to another brand.

During this stage, our understanding of motivations (the "why") behind behaviors helps predict the experiences that drive the most business value. In Figure 2, we know based on the segment profile and industry data that Professional Review Website and Visit Store are the most influential points in the smartphone purchase journey.

STEP 05 OVERLAY CURRENT MARKETING INVESTMENT WITH THE CUSTOMER JOURNEY

Once you understand the most influential points along the journey in your customer's purchase decision, identify how much Marketing spend you are investing at each of those points. This perspective helps you to understand where reallocation needs to occur, or where "right-sized" allocations are underperforming (likely due to poor messaging or execution).

Start by putting together an optimization model that identifies the likelihood that once you get someone engaged in a specific channel, they will buy your product versus another. You should compare that data to broader industry data that show average investments and the channels that seem to be collectively leading toward purchase. By comparing your numbers to industry-wide benchmarks, you can start to determine whether you are underinvesting, overinvesting or underperforming in a particular channel.

If you determine a channel is underperforming, it requires a bit more digging to understand whether it is the content/ message, lack of optimization or something else that is holding back your results.

STAGE IN CUSTOMER JOURNEY: SEARCH ON WEB

	Company A	Industry Benchmark
Paid Search Spend	$2Million / Quarter	$1.5Million / Quarter
Organic Search Spend	$250K / Quarter	$250K / Quarter
Paid Display Spend	$1.5Million / Quarter	$750K / Quarter
Total Spend	$3.75Million / Quarter	$2.5Million / Quarter
Purchase Likelihood	15%	12%

Figure 3: This high level chart illustrates how much is being invested in marketing channels that support the "Search on Web" touchpoint. The total spend compared to the likelihood that customers who engage with that channel then make a purchase helps validate that these are worthwhile investments.

Figure 4: This sample ecosystem mapped out for a financial services client summarizes the best interaction points and serves as the starting point for a more comprehensive integrated plan.

STEP 06 DETERMINE HOW BEST TO MEET CUSTOMER NEEDS WITH THE APPROPRIATE CHANNELS ACROSS THE LIFECYCLE

The process of mapping your current investments to the most influential moments in a customers purchase process helps pinpoint how you need to adjust your strategy. As you identify where you are over or under investing, it can also help you to determine opportunities to better meet customer needs through new channels or deeper channel integration. While many organizations are channel-centric and build strategies based on channel-specific research, a more customer-centric approach ensures that how you use each channel is actually meeting the customer's expectation.

To build an integrated plan and define the role each channel should play to be most effective, we recommend:

▪ Using context clues to create the most relevant customer experiences—these include time of day, location, device, and keyword.

  ▪ For example; if a customer is searching for running shoes they are sending a different context clue if they are searching at 9am on Monday from a desktop vs. 2pm on a Saturday from a mobile device. Ads and media should take those factors into account and be customized.

▪ Creating a test and measure strategy—When placing media options, you need to ensure you are testing not only different variants of the copy, image and placement, but also new tactics. For example, a year ago 0% of our clients had a Pinterest page. This is true mostly because it was a new medium, but without testing many clients

would wait until it was too late and the competition had moved beyond them. There are so many different things to be tested that a very targeted strategy to test and measure should be applied, and this includes resources and funds.

▪ Getting involved in the conversation—this is very specific to social, but customers are already having conversations about your brand. Your choice of how to engage in those conversations is critical. You should not be ignoring that they are happening or forcing people to engage with your brand where you want them to (for example your site vs. Facebook). Social listening and community management are two very critical factors that lead to more satisfied customers, and can provide product ideas and copy recommendations for you to use in other channels.

ENGAGE

One of the biggest barriers to engaging customers is taking intelligence about them and actually injecting it into your marketing to create more personal, meaningful and innovative experiences. The next few steps outline the crucial steps necessary to personalize marketing and media experiences, starting with organizational alignment.

STEP 01 CHANGING THE WAY YOUR ORGANIZATION THINKS AND ACTS

We know it's not easy to change the way an organization works, but to truly engage customers the way they want to be engaged, it's mandatory. To learn how to address some of these core issues, we asked Kathy Battle, a leader at Rosetta with experience on the topic, how to effectively drive organizational change.

Question 1: What are the most common barriers CMOs of technology businesses are going to encounter while focusing their whole business on a core customer segment?

Kathy: *Marketing organizations typically have a legacy of silos formed by channel and brand. In today's environment, where customers transition between channels at a rapid pace and utilize different content throughout their lifecycle than they have historically, the silos of channel and brand become a hindrance to customer engagement. Organizations typically reward their employees on metrics associated with independent channel effectiveness, failing to recognize their impact on effectively engaging consumers or the total customer experience.*

Question 2: How can they overcome these challenges in a large global organization?

Kathy: *By aligning the total organization's objectives and measures of success, businesses will start to move to a more customer-centric model. Critical components are:*

- *Establishing measures of effective customer engagement at the organizational level*
- *Determining the success of each department in achieving these goals*
- *Effective generation and transfer of Customer insights across teams*
- *The data and analytics structure to measure every point and the effectiveness as a whole*

It is also important to have clear direction from leadership. From there, large organizations need the tools and playbook to educate marketers on what the customer focus means for them. Updated briefs and other internal communication tools (particularly when things are being handed off from one group to another) that tie back to the target audience and customer journey are also critical.

Question 4: Putting the pieces in place to learn about customers and then align the business could take too long. How can we start to drive these changes now?

Kathy: *Organizations need to develop an agile mindset that enables them to act quickly, learn fast and continually evolve. Waiting for the "perfect" plan will ultimately result in delays and frustration across their teams. Utilizing consumer insights combined with market insight and organizational readiness, teams can identify the "quick wins" that will result in immediate impact and, importantly, continue to build knowledge about their organization's customers to inform continued program development. In parallel, teams can be building the longer-term infrastructure and programs that will facilitate scale and future success, and informing these with in-market insights will result in a more effective long-term platform for customer engagement.*
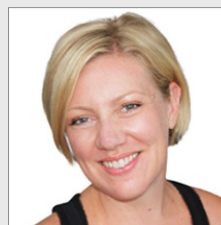
Kathy Battle
Partner | Strategic Planning
Katherine.Battle@Rosetta.com

STEP 02 LEVERAGE TECHNOLOGY TO ENABLE PERSONALIZATION

Delivering highly engaging experiences requires tight integration of your technical team with the teams responsible for extracting customer insights, building experiences and deploying marketing programs. Without the technology platforms that underpin data collection, content delivery and marketing automation, personalizing marketing experiences would not be possible.

There are three critical technology pieces that a marketing organization must bring together:

01. A platform to support data capture and profile building. Marketers are going to have data from a wide range of sources, including web analytics, social media, transactions and third-party data. Start by laying it all out and finding ways to pull together these pieces of data into profiles of audience segments that make sense. There may be some holes in the profiles to start, but as you collect additional data you can refine the models. Use these profiles to guide the setup of the platform you select to capture and aggregate data.

It is crucial to have an infrastructure in place that can handle the volumes of data and that can react as quickly as possible. Which platform you choose should be dependent on technical considerations and requirements, like the volume of data that exists, the velocity of data that will come in and the level of personalization that is expected.

02. Business rules. Business rules help map the communication strategy and messages to the appropriate user profile. The rules are actually a set of protocols and processes defined by the customer intelligence or analytics team, in conjunction with technical and marketing teams. As data flows into your personalization engine, the rules need to be able to scale and react in real time to triggers that occur to ensure the right pieces of data are being leveraged and digested.

03. The communication mechanism that distributes content. The distribution components of digital experiences are the tools marketers are likely to be most familiar with. These include things like a web content management system (like Adobe CQ5) or an email service provider (like ExactTarget). As the number of experiences or marketing channels grows, you will likely need the platform to be extensible in a way that can distribute content to new channels in the future.

Building, deploying and optimizing this infrastructure requires great collaboration between teams. The technology team needs to be involved in the initial segmentation, then in building the rules and, next, working with creative to figure out the communication plan. All along, analytics teams should be setting up a testing strategy to determine whether the rules are effective. As new intelligence is captured, customer intelligence teams should work with the technology team to refine the profiles.

STEP 03 DESIGN AND DEPLOY "INSIGHT-DRIVEN" EXPERIENCES

The right kind of intelligence about users can be used to truly "wow" potential customers by differentiating your brand with content that is more relevant or more engaging. To ensure these kinds of insights make their way into marketing and product experiences, we recommend you:

01. Work collectively to translate key pieces of intelligence into concise insights to spark great ideas. A good brief and a brand planner are critical to pinpointing the data that matters and synthesizing it for creative, technical, user experience and marketing teams.

02. Start with the data you have. If you aren't actively collecting the right kind of ongoing analytics data or a program hasn't been launched yet, use consumer segment data to create personalized messages.

03. Consider the context in which your messages will be received. Context can be time of day, location, device, keyword etc. For example, the search ad you want to see when you search for running shoes may be different when searching from your desktop at work vs. your mobile phone at the mall. As another example, you cannot assume your TV ads work as YouTube ads, given the difference in context.

04. Consider the full user experience beyond the click. For example, your ad text and landing page for a keyword search should meet the expectations of that specific keyword, as opposed to using the same ad copy and landing page for all your search ads.

Client Example – Lenovo

Rosetta's team leveraged segmentation data to drive channel, design and media strategy for Lenovo product launches and a website redesign. Data told us that their core audience understands technology and prefers to do most research online, but would also respond well to messaging speaking to a "busy professional."
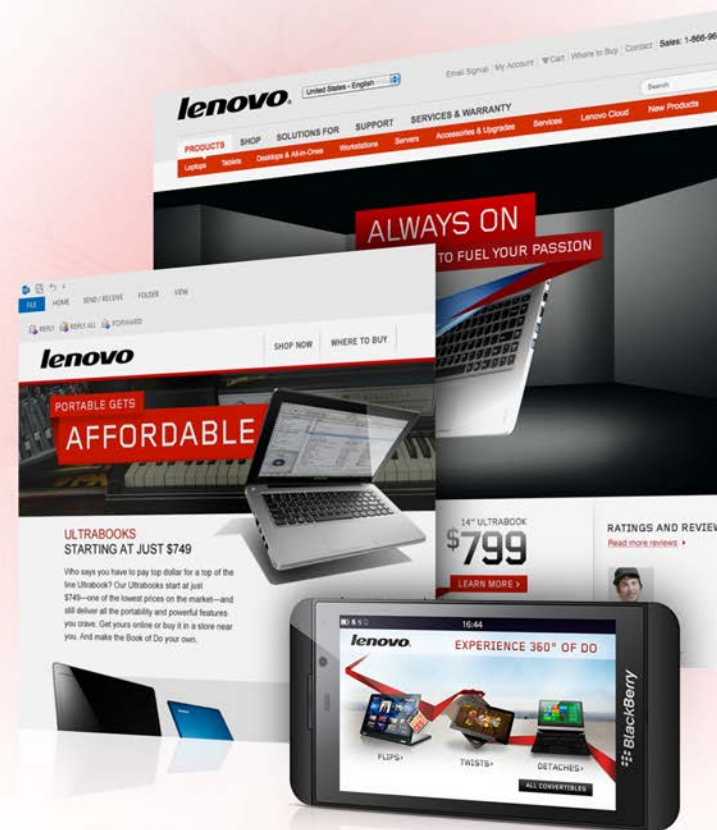
STEP 04
EVOLVE EXPERIENCES THROUGH DATA-DRIVEN INSIGHTS

Segmentation provides a great starting point to tailor customer experiences, but to establish a meaningful relationship over time you must establish a data strategy that will enable the continual learning and augmentation of knowledge to drive increasingly relevant experiences. By creating a data strategy that focuses on both implicit and explicit data captured across all channels over time, you can effectively increase the knowledge you have about your customer's behavior, value and segment—in addition to the interactions that are creating the most value for your brand.

1 Analysis & Insight
What do we know right now?

Customer database(s)

Identify & Understand the Targets:
- What are their needs / barriers?
- What is their customer journey?
- How and when should we engage?

Approach:
- Audience profiling
- Behavioral analysis
- Predictive modeling
- Propensity modeling
- Target refinement

3 Insight Expansion
What more can we learn?

Transactional Data

New Audience Insight

Social Listening Data

Analytics Data

2 Targeting & Tailoring
How should we engage?

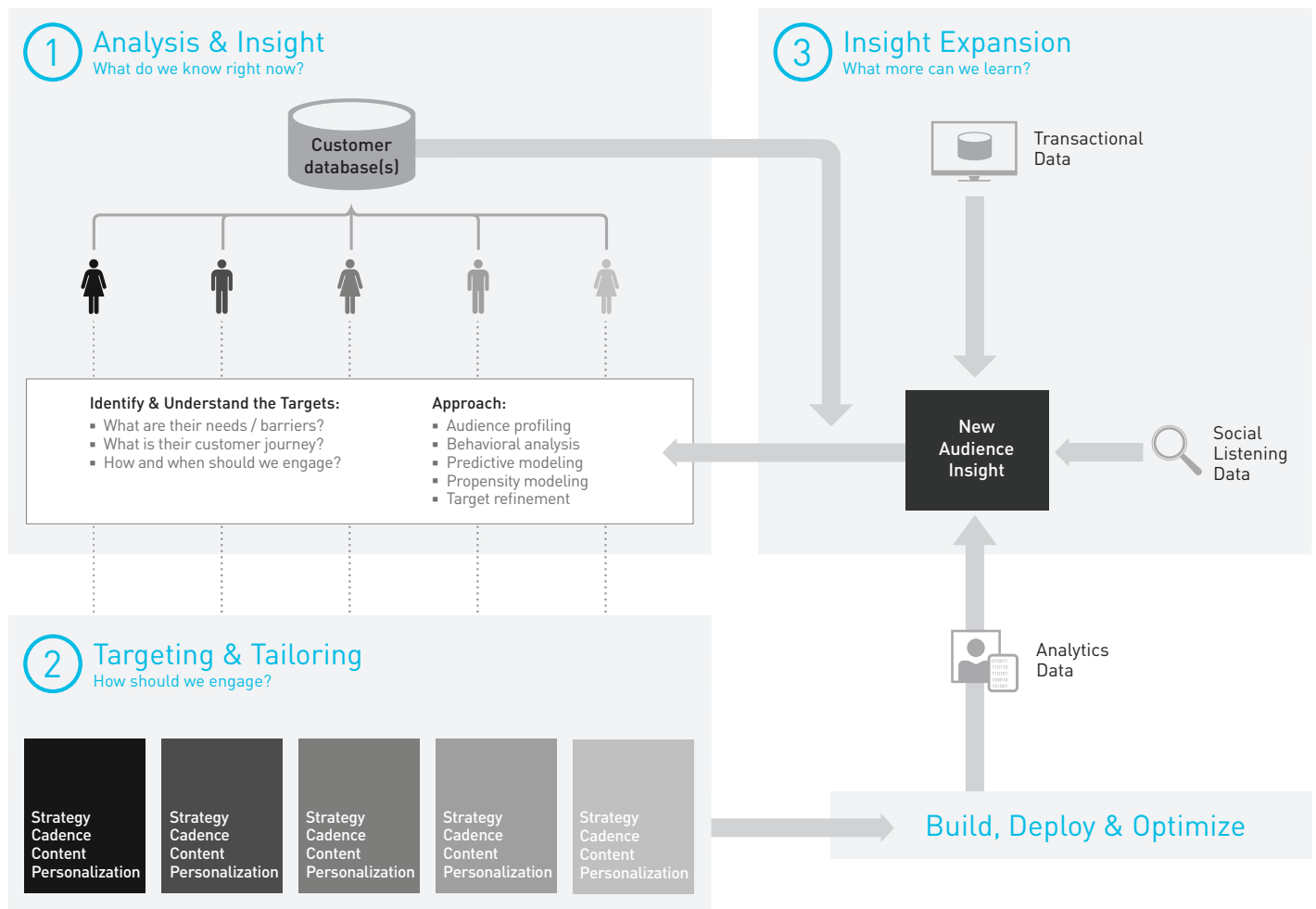| Strategy Cadence Content Personalization	Strategy Cadence Content Personalization	Strategy Cadence Content Personalization	Strategy Cadence Content Personalization	Strategy Cadence Content Personalization

Build, Deploy & Optimize

Figure 5: This diagram illustrates the flow of customer data as it is used to develop initial targeting strategies, then deliver experiences that can be learned from and re-injected into the data strategy. The goal is to progress from broader segment-based interactions to "segment of one" personalized experiences as you learn more about individuals.

ACTIVATE

Customer engagement is the first step toward a relationship. Once someone has interacted with your brand in any way, it is the marketer's duty to learn about them, find ways to continually engage with them and ultimately activate a lifelong relationship with them. Doing so requires thinking about who your customers are, enabling a seamless transaction and finding ways to build advocacy.

STEP 01 REDEFINE YOUR DEFINITION OF "CUSTOMERS" AND "TRANSACTIONS" AS YOU DEPLOY PROGRAMS

In today's world, where brands have 20 million Facebook fans, a million Twitter followers and lots of non-paying customers regularly using branded mobile applications, everybody is a customer. Even if they have never bought a thing from you, they are engaged with your business or talking about your brand, and it's only a matter of time before they buy or influence someone else's purchase. Change the way your organization thinks about who your customers are by broadening the definition and thinking about a transaction not just in the context of money changing hands but as any interaction where a customer is adding value to your business.

With that definition, a "Like" that gives you $10,000 worth of media impressions, a newsletter sign-up that gives you permission to share new products and a positive product review on Amazon.com are all transactions.

Google has over 15 million fans on Facebook, providing a massive platform for brand awareness and nurturing relationships across their product categories.

STEP 02 SHORTEN SALES CYCLES BY SEAMLESSLY CONNECTING MARKETING AND TRANSACTIONAL TOUCH POINTS

If you know what customers are looking for when they engage with you, you can meet or exceed their expectations, hopefully pushing them closer to their next transaction, conversion or interaction. As you better understand what customers are looking for at various channels, you should find ways to integrate more relevant offers and CTAs that quickly help a customer advance from one stage to the next. Examples of ways to do this include incorporating a try-to-buy offer to capture customer information and get someone using your software or arming Sales teams with mobile tools containing relevant content to ensure they have what they need to make the onsite visit worthwhile.

STEP 03 GET CUSTOMERS TO ADVOCATE FOR YOUR BUSINESS

For every type of business there are certain customers that will be more engaged than any others and that become exponentially more valuable because of their willingness to advocate for your brand and products. A study from the University of Rhode Island showed that brand advocates are 83% more likely to share information about a product than typical web users, and 50% more likely to influence a purchase.**

Follow these steps to pinpoint your advocates and get them working for your business.

01. Start by identifying who are your advocates—natural hand raisers who are enthusiastic about your brand. In social, we use various listening tools across multiple social platforms, including Socialbakers, Sysamos and Brandwatch.

02. Once your have identified your advocates, energize them to take action. Prompt them to write reviews and stories, upload photos and videos and answer questions about your product or service. Advocacy platfors like Zuberance, Crowdtap and Extole can help identify and energize advocates.

03. The next step is amplification. Make it as easy as possible for our advocates to share their enthusiasm and their positive content with their network of friends and family. Add share buttons for all the social networks for example.

04. The last step is to recognize your advocates. Give them social shoutouts, feature them in your marketing communications and begin a 1:1 relationship that's designed for the long haul.

An important thing to remember is that there is a difference between authentic advocacy and incentivized advocacy. Encouraging your customers to talk about you by leveraging a selfish motive (such as referral programs or payment) taints the recommendation. This makes your customers look bad because they're trying to score some cash or reward points at their friends' expense; and it reflects poorly on your brand. Keep recommendations for your brand authentic by being customer-obsessed. Then you won't have to incentivize your customers to talk about you.

**Univeristy of Rhode Island, College of Business, http://www.mediapost.com/publications/article/150535/#axzz2Sp2RyBlT

STEP 04 RE-INJECT INSIGHTS AND DATA INTO THE BUSINESS TO CONTINUALLY BUILD SMARTER PROGRAMS

With all of the data that is readily available today, it's important not to lose sight of why we are analyzing it in the first place. Data and analyses are only meaningful if insights obtained are actionable and can be used to gain more leverage with your marketing dollars to grow your customer relationships over time.

Here are 3 fundamental rules of thumb that are key to success:

01. **Stay focused on your primary business goals**. Many interesting data points will emerge in any campaign or customer analysis. The key thing to keep in mind is relevance. Does it matter to your business? Can the finding be used to drive a change in your programs? Or is it just an interesting data point?

02. **Spend time where it is worth it.** This is related to point one above, but there is also an important nuance. Many analysts and marketers tend to stay focused on where there is an abundance of information, even if it's not the right information, because it's readily available. If your primary problem is converting sales leads to customers, then the bulk of your efforts needs to focus on parsing out specific customer engagement activities that helped drive those conversions, no matter how difficult to analyze.

03. **Make 1 or 2 strategic changes vs. many minor, low impact changes.** It takes time to build a solid data story to support a strategic shift. Marketers do feel the pressure to optimize a campaign quickly, turning to a more tactical change, such as swapping out one creative execution for another. Oftentimes, changes like this will result in a slight uptick in performance before going back to typical campaign levels. Real data-driven strategic pull-through requires looking at trends and customer behaviors over time. This means getting to know who your customers are by what they do with your assets, or better yet, what they are not doing with your assets. Taking the time to build a solid measurement framework will help set the stage for a much more impactful customer engagement strategy that will yield real change.

Every business will be in a different stage of maturity regarding how well they engage their customers, but in all cases there is room for improvement.

Customer engagement cannot happen without alignment between leaders in the Marketing, Technology/IT, User Experience and Customer Insights teams coming together. In our experience, the most important first steps are bringing together the right internal stakeholders, and then collectively identifying the highest priorities and greatest opportunities for significant business improvement.

To align these teams and dive deeper into the specific state of your business, Rosetta frequently conducts interactive sessions with clients looking to change their business.

ID/E/A
WORKSHOP SESSION

Attendees:
Marketing, Technology & Customer Insight Leaders

Time Commitment:
4-6 hours

Format:
- Customer Needs Mapping
- "Breaking Down the Silos" Exercise
- Identification of Barriers
- Prioritization
- Organizational Alignment Training

Deliverables:
Prioritized action items.

To discuss ways Rosetta can help your business better engage your customers, contact Tammy Soares at Tammy.Soares@Rosetta.com.

About Rosetta

Rosetta. Unlocking and Activating™ Human Behavior.

Rosetta is a Customer Engagement Agency for the Empowered Age. We combine human insights, technology and next-generation storytelling to craft meaningful connections that drive tangible results. In 2012, we were ranked a "Strong Performer" in Forrester Research Wave reports evaluating customer engagement agencies, global commerce service providers and mobile marketing agencies.

REPORT CONTRIBUTORS

Tammy Soares
EVP | Rosetta West
Expertise: Business Planning,
Customer Engagement

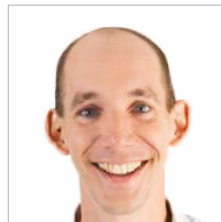**David Worth**
EVP | Global Strategic Planning
Expertise: Customer Segmentation,
Marketing Strategy, Program
Management

Kathy Battle
Partner | Strategic Planning
Expertise: Lifecycle Marketing,
CRM

Jason Tabeling
SVP | Paid, Owned
& Earned Media
Expertise: Integrated Marketing,
Search Marketing

Garrett Colburn
Associate Director |
Marketing Strategy
Expertise: Marketing Strategy,

Ellen Curtis
Director | Social Media
Expertise: Social Media Strategy,
Customer Advocacy, Brand Building

REFERENCES

**Forrester Research, World Global Smartphone Forecast, 2012 to 2017

**Oracle "Global Insights on Succeeding in The Customer Experience Era study, 2013, http://www.informationweek.com/software/enterprise-applications/5-steps-to-superior-customer-experience/240147720

**Forrester Technographics Research

**"What's Critical In The Telecommunications Vertical", CMO Council Study, http://www.cmo.com/articles/2012/9/17/a-lesson-in-loyalty-from-mobile-phone-subscribers.html

**http://www.forbes.com/sites/ciocentral/2012/04/19/customer-satisfaction-by-the-numbers-an-industry-breakdown/

**http://www.prweb.com/releases/2012/5/prweb9470970.htm

**Univeristy of Rhode Island, College of Business, http://www.mediapost.com/publications/article/150535/#axzz2Sp2RyBlT