

Forbes

INSIGHTS

DATA DRIVEN AND DIGITALLY SAVVY:

THE RISE OF THE NEW MARKETING ORGANIZATION

THE GROWING ADVANTAGE GAP BETWEEN DATA-DRIVEN
AND TRADITIONAL MARKETING APPROACHES



IN ASSOCIATION WITH: **TURN**

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FOREWORD

For the third year, Turn and Forbes Insights have partnered to survey marketers on their perceptions on a topic of significant relevance to the advertising industry.

This year, our focus is on how and why business leaders should build “data-centric” enterprises to leverage the full power of all of the insights and resources at their disposal. The study shows that while some forward-thinking executives have the tools and people in place to win with data, many companies need help to become fully fledged modern marketers. In the pages that follow is a wealth of expertise and guidance provided by advertisers at the top of their data game.

While some may be “laggards” and others “dabblers,” every company has the potential to become a data-driven marketing success. Investment in resources and expertise is required, but it is even more important to commit to wholesale change and put data at the center of everything you do. Turn works with the world’s top brands and agencies to do just that—help them transform their marketing and become data leaders. We hope that you will use these insights to become a data-centric marketer too.

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TURN

Turn delivers real-time insights that transform the way leading advertising agencies and enterprises make marketing decisions. Our integrated cloud platform enables data management, cross-channel advertising, and advanced analytics from a single login, along with point-and-click access to more than 150 integrated technology partners. Turn is headquartered in Silicon Valley and provides its products and services worldwide. For more information, visit turn.com or follow [@turnplatform](https://twitter.com/turnplatform).

INTRODUCTION & METHODOLOGY

For marketers, the digitization of business has opened up a new world. No longer are they forced to launch campaigns while blindly relying on gut instinct and hoping for the best. Marketing and advertising campaigns that succeed do so by integrating a range of intelligent approaches to identify customers, segment, measure results, analyze data and build upon feedback in real time.

In today's global economy, there is a great urgency to be able to conduct data-driven marketing campaigns, as organizations are under pressure as never before to deliver results. "Data-driven marketing" is the practice of employing data to achieve marketing goals and measure results, through engaging customers and delivering greater value to the business. This builds upon a number of forces, such as increasingly digitized operations and increasingly demanding and digitally connected customers.

Data insights have long played a role in efforts to drive business growth and reach new and existing customers. Insights generated by customer and transaction data have helped answer the four w's of marketing—who, when, where and what, says Dr. Ravi Dhar, professor of management and marketing, and director of the Center for Customer Insights at the Yale School of Management. "It's always been about who buys it, when did they buy it, where did they buy it, and what did they buy." The challenge is now to answer the fifth "w" question—why. To correlate data to the "why," information needs to be brought together from across the enterprise and market landscape to be transformed into actionable insights. "This is really critical to making good decisions, but the data can't tell you the 'why' by itself. You need good managerial understanding to be able to answer the 'why.'"

Data-driven marketing opens up a wealth of new perspectives and opportunities for businesses, and ultimately, it's all about customers. A successful data-driven effort needs to be accompanied by efforts to listen to and engage with customers. Data-driven marketing is customer-centric marketing.

Businesses are only just starting to understand the power and potential of data-driven marketing. Ultimately, a data-driven organization learns to

"It's always been about who buys it, when did they buy it, where did they buy it, and what did they buy."

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employ data analytics as part of all marketing campaigns, from conception to post-campaign review. Within a data-driven enterprise, information can move freely and is consistent across all channels. Within organizations that have achieved high levels of customer intelligence, there is a data-centric culture that is supported from the top down, and decision makers at all levels are provided training and support in mastering the power of data to better reach their markets.

"There's really very little excuse in today's marketing department to not use data," says Russell Glass, head of B2B product for LinkedIn, and coauthor of *The Big Data-Driven Business* (Wiley). "With the cost of processing, storage and tools having gone down so much, if you're not using data to make your decisions, or at least to inform your decisions, you're probably not doing your job."

To explore how marketing leaders see their organizations evolving, Forbes Insights, in association with Turn, launched a survey of top executives from a range of industries. The goal of this research is to illuminate marketing leaders'

perceptions of data-driven marketing, the impact on their organizations, who should lead and the role of technology. Forbes Insights also conducted in-depth interviews with half a dozen executives and thought leaders to provide context for the findings.

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METHODOLOGY

The survey was fielded in October 2014 and received a total of 331 responses from senior executives. Sixty-four percent of respondents were vice presidents or directors, and 28% were C-level executives or senior vice presidents. Respondents hailed from marketing (26%), and another 26% focused on analytics. Industries represented in the survey included technology (21%), retail (18%), telecommunications (15%) and consumer packaged

goods (10%). Other industries included advertising, travel, automotive and banking. Close to half, 48%, came from companies with \$1 billion or more in annual revenues, and another 16% had between \$500 million and \$1 billion in revenues. In terms of size by number of employees, 24% were with companies with more than 50,000 employees, and another 27% represented companies with between 10,000 and 50,000 employees.

EXECUTIVE SUMMARY

The business environment has changed dramatically over the past five years, and the rules of marketing have changed. Thanks to the pervasiveness of technology solutions, it is easier to rapidly reach out to customers and to receive real-time feedback on the success of campaigns. At the same time, data-driven marketing requires changes in organizations—calling for new skills, new processes and new ways of looking at customer relationships. Marketing is no longer a series of projects and campaigns, it is now an ongoing process of engagement and learning.

While marketers have been employing data in various forms for some time, a convergence of tools and technologies is changing the game. “What’s different now is that we have access to individual transaction-level data,” says Dr. Michael Braun, associate professor of marketing at the Cox School of Business at Southern Methodist University, and program chair of the section on statistics and marketing for the American Statistical Association. “Twenty years ago, outside of supermarket scanner data, most of the data about specific customers that was available would have been survey driven. We might have had aggregated sales or advertising numbers, but we couldn’t match specific purchases, or specific marketing activities, to specific customers. So we didn’t have a long or rich profile about what specific customers were doing. We also didn’t know exactly what advertising messages they were exposed to. Now, not only can we can track transactions of individuals,

but we can also know which marketing interventions or which ads that person was presented. We now have an ability to learn about how different types of customers respond to different types of marketing activities, and adjust those activities accordingly.”

The global survey of more than 300 executives finds widespread agreement that data-driven marketing is crucial to success in a hyper-competitive global economy. While many organizations have some form of data-driven marketing in place, they are being implemented in piecemeal fashion, within siloed business units, without fully taking advantage of the resources that are available. Data-driven marketing does not spring up from a single program or effort; it is the lifeblood of the new marketing organization that draws in resources from many parts of the enterprise. Without data, there is no customer intelligence behind marketing programs.

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KEY FINDINGS

The following are key findings that have emerged from the latest Forbes Insights survey of top-level executives in large organizations:

1. DEMONSTRABLE RESULTS

Data-driven marketing has delivered demonstrable results in terms of customer loyalty, customer engagement and market growth. Organizations that are “leaders” in data-driven marketing report far higher levels of customer engagement and market growth than their “laggard” counterparts.

2. COMMITMENT TO DATA

Growth and commitment to data-driven marketing are on the rise, with most organizations planning to step up their efforts. However, about half of executives admit their efforts are lagging or are siloed across their enterprises. A majority are now collecting demographic data on customers, but most other data types remain uncaptured.

3. INTEGRATION

Data-driven marketing doesn’t happen in isolation, or solely within one section of the marketing department. Data-driven marketing is an enterprise-wide effort that requires data, expertise and innovative thinking from many parts of the enterprise. For most of the companies leading in this practice, there is also tight integration between organizations’ overall digital initiatives—adoption of big data, cloud, social and mobile—and marketing campaigns.

4. TRAINING

Despite increasing emphasis on data-driven marketing, the majority do not offer training and education to develop data-driven marketing skills. Leaders tend to offer programs and encourage employee development in this area.

THE DIGITAL MARKETING CONTINUUM

What does a data-driven marketing organization look like? While every business is different, there is an evolution that can be traced, reflecting progress toward the goal of a data-driven culture. For the purposes of this study, four distinct stages were identified. Respondents' profiles on the spectrum were determined by their responses based on whether they employ analytics to measure returns on their marketing programs, and their descriptions of data-driven marketing efforts to date.

Those respondents indicating that their data-driven marketing efforts were "enterprise-focused," and that they employ data analytics for most or all of their marketing, are defined as "leaders" for the purposes of this survey. About 11% of respondents can be considered leaders in data-driven marketing.

(Figure 1.) Throughout this report, the practices and outcomes of the leaders will be examined and contrasted against those of organizations with less-developed initiatives. Again, the important thing to remember is the most successful data-driven marketing businesses have these practices baked into the culture of their organizations, and are able to move swiftly between engagements.

The technology, telecommunications and retail sectors are the most highly represented among the leaders group, with close to two-fifths of members of these segments meeting the leader criteria. (Figure 2.)

The key stages on the continuum include the following:

FIGURE 1. THE DATA-DRIVEN MARKETING CONTINUUM



LAGGARDS

Laggards don't collect data or analytics for marketing and don't plan to in the future. They have no formal digital marketing efforts under way. Any digital marketing efforts are typically one-off, manual efforts involving employees acting on their own. Knowledge about projects is retained in individuals' heads, versus being documented or systematized as a process. Digital marketing efforts exist but are siloed between departments with little connection or coordination. Projects are outsourced by departments, not enterprises. The quality of data delivered is questionable. A third party (agency) may be contracted to handle aspects of this, but this engagement remains outside the scope or awareness of the core enterprise. No efforts are made to measure returns, either formally or informally. No budgets or funding exists; everything is conducted on an ad-hoc basis.

DABBLERS

Dabblers have begun to incorporate data into some phases of their marketing process, but lack the skills and vision to see returns. Typically, within their organizations, planned digital marketing efforts begin to formulate within pockets of more forward-looking departments or organizations. This is most likely to be within the marketing department, but may occur at the sales level or within customer service departments. These efforts remain confined to single channels, with no sharing of data or processing capabilities. Most efforts rely on social media; data may be collected but not examined. Efforts to digitally engage customers may be hit or miss, with many campaigns off-target. Some informal efforts are made to measure campaign progress. The effort may have an executive champion. While no formal budget or funding is available, managers are able to allocate some funding or staff time from other marketing programs.

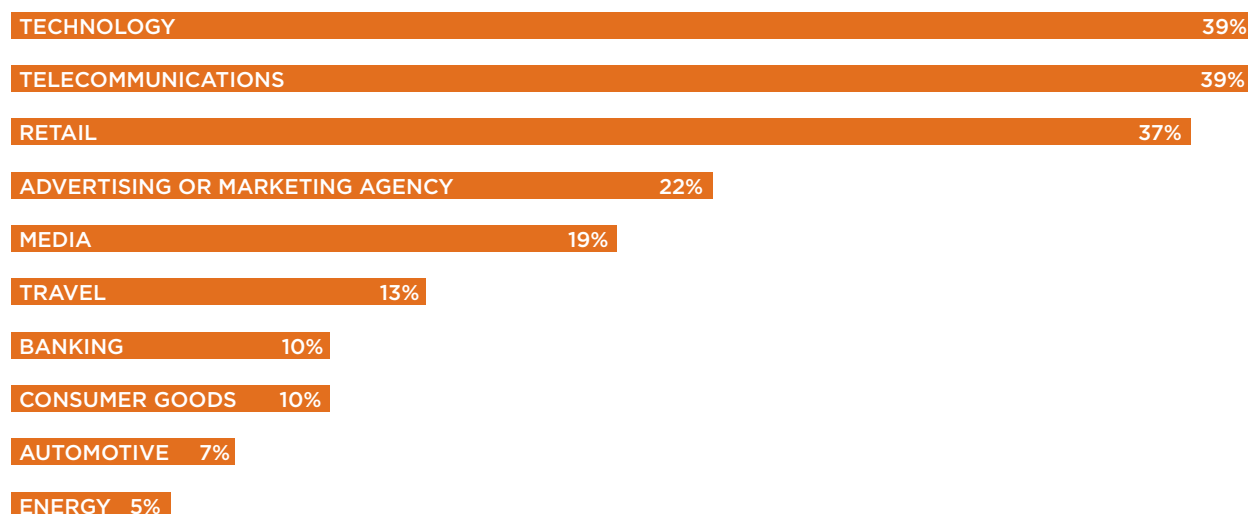
CONTENDERS

Contenders regularly use analytics for making and measuring decisions. They are ready to invest to build digital marketing acumen across the team. Within these organizations, efforts are under way to bring customer-facing channels together with common data and applications. Staff are trained to manage these processes. Automated approaches are put in place. Marketers are working toward a common view of various forms of engagement—such as mobile, web, social, video. Digital marketing campaigns become more focused and responsive to market needs. Formal metrics to measure some activities are adopted. The digital marketing program likely has a high-level executive in charge, such as the chief marketing officer. A formal budget and funding source is established for these programs, though it may be only a small percentage of the traditional outlays. Tools and technologies are made available and supported by the organization.

LEADERS

Leaders always measure results with analytics, strive to make data-driven decisions and actively transform personnel roles to be more digitally savvy. These organizations base all marketing decisions on data. Data analytics is part of all marketing campaigns, from conception to post-campaign review. Data moves freely and is consistent across all channels, and is considered trustworthy and timely. Most activities are automated, but include human oversight and intervention when necessary. Campaigns are highly effective, with considerable feedback in real time, meaning the insights are available when marketers need them. Marketing efforts are well-tailored to customer groups. Formal metrics measure all aspects of campaigns and are leveraged for ongoing optimization. These metrics are constantly refreshed and realigned. Companies offer ongoing training and refresher programs to keep employees well engaged, as well as to stir innovation. Business leaders, such as the CEO or CFO, are on board and fully engaged with the effort. There may even be a dedicated C-level executive—such as a chief digital officer—leading the effort, along with staff that have titles such as “data analysts” or “data scientists.” A formal budget and funding source finances these programs, which are a major part of the marketing budget. IT and other parts of the enterprise are actively engaged in identifying and supporting tools and technologies to enable the effort. Data is well integrated into operations across the enterprise and its partners.

FIGURE 2. LEADERS — DATA-DRIVEN MARKETING LEADERS — BY INDUSTRY



DATA-DRIVEN MARKETING RESULTS

Data-driven marketing has delivered demonstrable results in terms of customer loyalty, customer engagement and market growth. Organizations that are “leaders” in data-driven marketing report far higher levels of customer engagement and market growth than their “laggard” counterparts.

Historically, consumer-focused companies—such as banks and telecommunications providers—have been at the forefront of data-driven marketing initiatives, according to the Yale School of Management’s Dr. Ravi Dhar. Now, new types of businesses are getting involved, often seeking to “connect the dots” of data—such as advertising results, purchasing data or social media. “The integration of the dots is more important than the dots themselves,” he says. The key is for marketers to “understand what they see in social media, what customers bought in a store, and what other media did they see to get the overall understanding of how media consumption drives both online and offline purchases.”

There are a number of tangible benefits being realized as a result of data-driven marketing, the survey finds. Most prominent is a noticeable positive impact on how businesses are able to relate to their customers. Many executives report they have seen demonstrable results in terms of greater customer loyalty, customer engagement and increases in the number of customers as a direct result of their data-driven marketing initiatives. (Figure 3.)

The benefits are even more pronounced among companies with highly data-driven cultures. When looking at results along the data-driven marketing continuum, organizations that are “leaders” in data-driven marketing report far higher levels of customer engagement and market growth than their “laggard” counterparts. Close to three-fourths of leaders say they are seeing increased customer engagement as a result of their efforts, compared with only 24% of the laggards. Likewise, while two-thirds of the leaders are seeing new customers as a result of their initiatives, only 19% of the laggards are acquiring new customers. A majority of the leaders also report high levels of customer satisfaction and

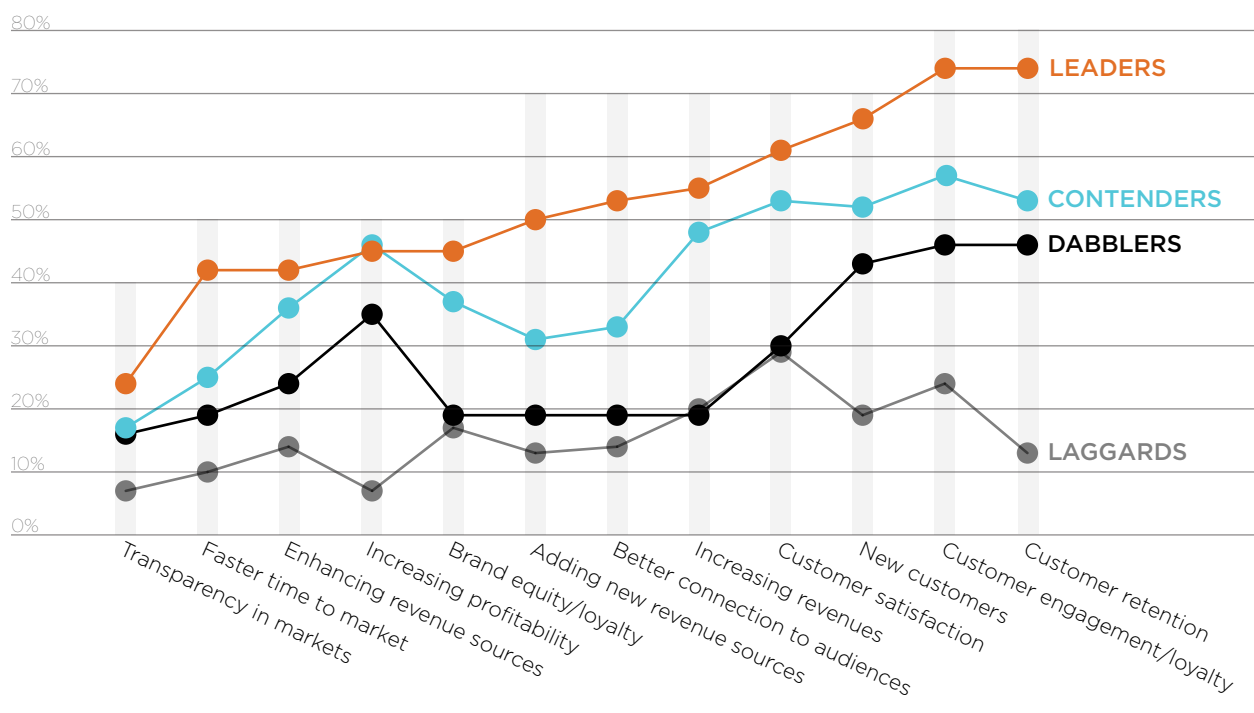
retention as a result of data-driven marketing, contrasted with only 29% of laggards delivering customer satisfaction and 13% benefiting from enhanced customer retention. (Figure 4.)

“By using data properly, although not relying on it entirely—good creative marketing and going against the grain sometimes can be smart—businesses can in most cases lower their advertising and marketing spend, while actually increasing trial and engagement,” says Rodger Roeser, CEO of The Eisen Agency, a marketing agency based in Cincinnati. “The largest of businesses to the smallest of mom-and-pops

FIGURE 3. WHERE COMPETITIVE ADVANTAGE HAS BEEN ACHIEVED AS A RESULT OF DATA-DRIVEN MARKETING



FIGURE 4. WHERE COMPETITIVE ADVANTAGE HAS BEEN ACHIEVED AS A RESULT OF DATA-DRIVEN MARKETING — BY STAGE OF DEVELOPMENT



need to know and understand their customers as best as they can.”

In terms of employing data-driven marketing to better support and grow the customer base (the top three variables cited in Figure 3), executives in the travel and hospitality industry report the most positive results. A majority

of executives in this category report greater customer engagement, growth in the customer base and increased customer satisfaction. The consumer packaged goods and retail sector also saw higher levels of positive results from these efforts. (Figure 5.)

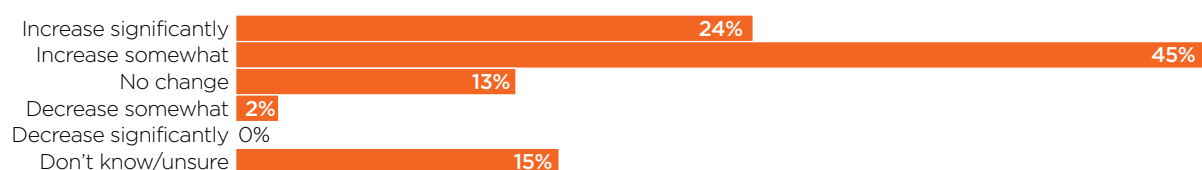
FIGURE 5. WHERE COMPETITIVE ADVANTAGE HAS BEEN ACHIEVED AS A RESULT OF DATA-DRIVEN MARKETING — BY INDUSTRY GROUP

	CUSTOMER LOYALTY	NEW CUSTOMERS	CUSTOMER SATISFACTION
TRAVEL	67%	56%	59%
CONSUMER PACKAGED GOODS	59%	31%	31%
RETAIL	55%	52%	50%
ADVERTISING OR MARKETING AGENCY	50%	36%	36%
TELECOMMUNICATIONS	45%	49%	41%
AUTOMOTIVE	43%	26%	26%
TECHNOLOGY	41%	46%	33%
MEDIA	35%	35%	27%
BANKING	33%	40%	40%
ENERGY	30%	10%	10%

DATA-DRIVEN MARKETING ON THE RISE

The potential results that can be gained from data-driven marketing have caught the attention of many marketing executives. However, about half of executives admit their efforts are lagging or are siloed across their enterprises. A majority are now collecting demographic data on customers, but most other data types remain uncaptured.

FIGURE 6. EXPECTED CHANGE IN DATA-DRIVEN MARKETING OVER NEXT 3 YEARS



There is clear momentum toward data-driven marketing—69% anticipate stepping up their use of data-driven marketing over the next three years. Close to one out of four executives report that this growth will be “significant.” (Figure 6.)

Even companies with strong stakes in the physical world recognize the efficacy of data-driven marketing. American Greetings Properties, which manages brand marketing for a range of offerings, has increasingly been employing data-driven marketing against online media. “We’re layering it on what we already have,” says Janice Ross, vice president of brand marketing at American Greetings Properties. “It’s really about continuing to service all consumers across all platforms.”

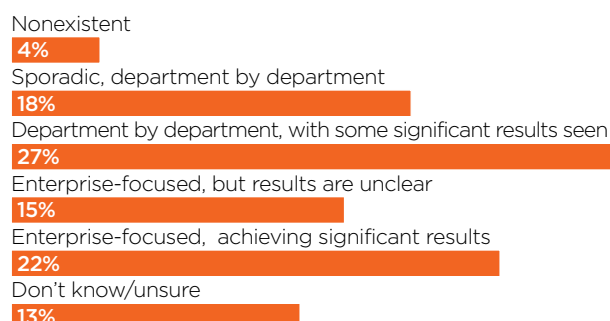
While there is widespread acknowledgement that data-driven marketing needs to accelerate, many companies are only just beginning their journey. About half of executives admit their efforts are lagging or are siloed. Twenty-two percent report their data-driven efforts are virtually nonexistent or are confined within informal individual departmental engagements. Another 27% report their efforts are department by department, but are delivering results. In addition, 37% report their efforts are enterprise-wide. (Figure 7.)

The key to successful data-driven marketing is the ability to pull together data from a variety of sources, and to integrate that data into a

single, comprehensive view of who the customer is, what her preferences are, how she reacts to special offers and her propensity to buy products or services. There is a wide range of data that needs to be introduced to form this view, as employed by executives responding to the survey. Demographics is the top choice, followed by behavioral data. Another 38% are going right to online transaction data to build a picture of the returns to their marketing campaigns. (Figure 8.)

“All of this combines to enable smart marketers to far more effectively tweak the consumer in the right place, at the right time and with the right types of messages,” says Roeser of The Eisen Agency. “This is critical for a number of reasons. The advertising and marketing game is not an inexpensive dalliance, particularly in

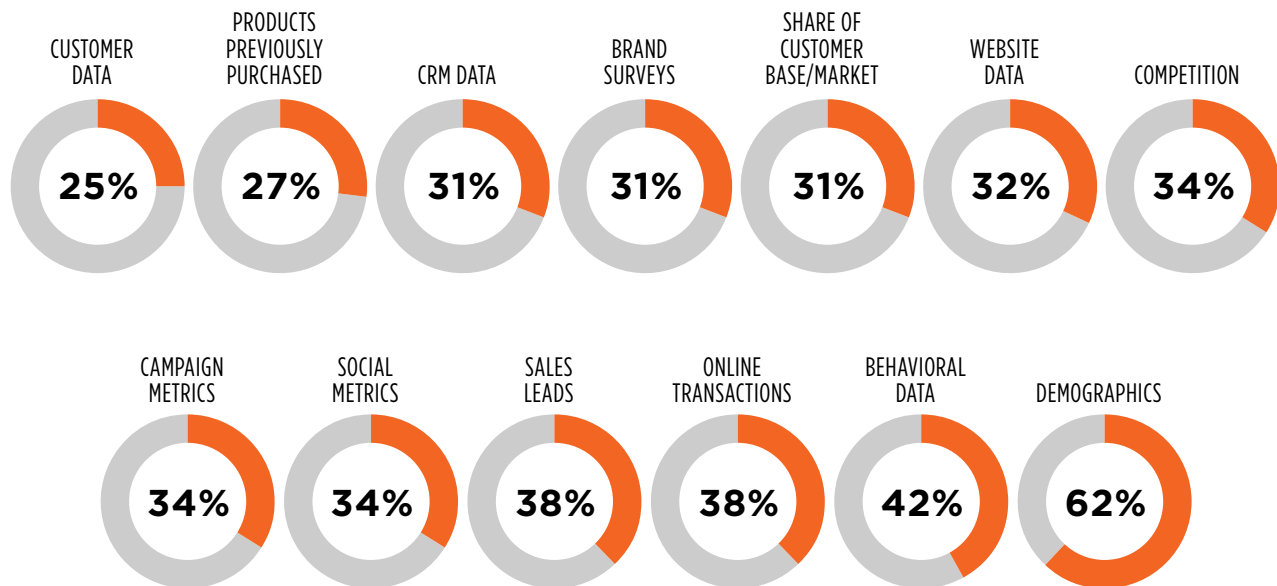
FIGURE 7. ASSESSMENT OF DATA-DRIVEN MARKETING INITIATIVES



the CPG space, where competition is very high. You must not only have a strong and very clear brand position, but you must also have a clearly defined target public with whom you wish to relate. For example, if you are toilet paper, and you think your target public is 'everyone' because everyone uses your product, your product will

fail. Smart marketers understand that data must be used to create a strong consumer profile, then target that specific profile with the right type of branded message that will most likely tweak that profile to act."

FIGURE 8. TYPES OF DATA BEING COLLECTED FOR DATA-DRIVEN MARKETING INITIATIVES



THE POWER OF ANALYTICS

A majority of companies employ analytics to measure marketing returns, mainly against online media-based campaigns. Most expect reliance on analytics for decision making will increase sharply, as will spending on analytic tools.

FIGURE 9. DO YOU EMPLOY ANALYTICS TO MEASURE MARKETING CAMPAIGN RETURNS?

YES, FOR ALL MARKETING ENGAGEMENTS

21%

FOR MOST OF OUR MARKETING ENGAGEMENTS

34%

FOR SOME, BUT LESS THAN HALF, OF OUR MARKETING ENGAGEMENTS

12%

FOR ONLY A FEW SELECT PROJECTS

13%

WE DON'T EMPLOY ANALYTIC MEASUREMENTS AT ALL

4%

DON'T KNOW/UNSURE

16%

"Data analytics is important to us," says Ross of American Greetings Properties. "We utilize a social media back-end system to help us understand which posts work best for us and where our traffic is coming from. We also try to accumulate three to six months' worth of data to identify trends. Sometimes we use it to see shifts in real time, and also use it cumulatively to see if we should continue to pursue a certain path."

A critical component of data-driven marketing is the ability to develop the data into actionable insights that can gauge the success of campaigns. Overall, 67% of executives indicate they now employ analytics to a significant degree to measure returns on their marketing programs. (Figure 9.)

Advertising is the discipline that is seeing the most deployment of data-driven marketing. In a majority of companies, data analytics are being applied to online media advertising. Just under half, 46%, are also employing analytics against traditional media

placement activities, and 41% to support direct mail campaigns, suggesting that these efforts extend beyond the digital realm as well. (Figure 10.)

Leaders in the survey are already well along with the application of data analytics to both online and traditional media. Eighty-two percent employ analytics to measure the results of campaigns on online media, versus 53% of laggards. A similar advantage gap exists for measuring and analyzing the results of traditional media campaigns—61% of the leaders employ analytics here, versus 42% of laggards. (Figure 11.)

There is an increasing reliance on data for marketing decisions, the survey finds. More than seven out of 10 executives expect to see a greater reliance on data in decision-making over the next three years. (Figure 12.)

Overall, 84% of the leaders in the survey intend to either "significantly" or "somewhat" increase their reliance on data analytics to support decision making. By contrast, only 42% of laggards intend to pursue

FIGURE 10. WHERE MARKETING CAMPAIGN ANALYTICS ARE EMPLOYED

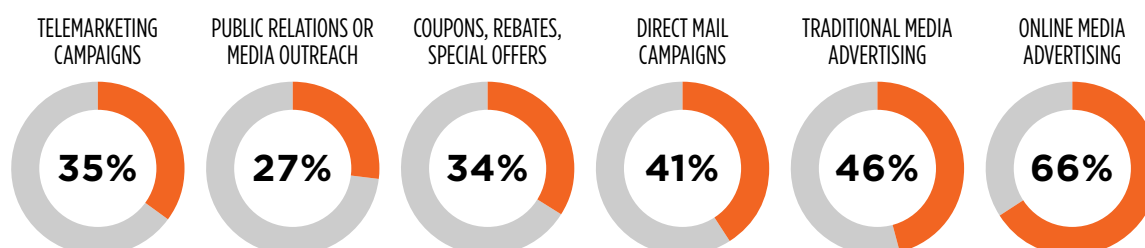
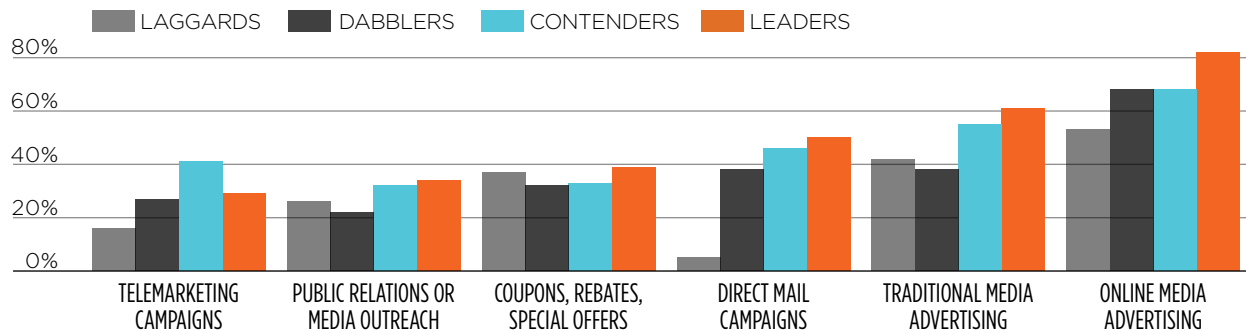


FIGURE 11. WHERE MARKETING CAMPAIGN ANALYTICS ARE EMPLOYED — BY STAGE OF DEVELOPMENT



this opportunity. Even more telling, close to half of executives in the laggard group indicated they simply didn't know the direction their companies were taking in this regard, suggesting a disconnect within their enterprises. (Figure 13.)

Many organizations are increasing their investments and reliance on data-driven marketing and analytics. Data-driven marketing is a key enabler of business growth. A majority of executives, 60%, expect to increase their spending on data-driven analytics over the next three years. This is even more pronounced among the leaders, who are four times as likely as the laggards to significantly be increasing their spending to build upon their analytical capabilities. Once again, tellingly, close to half of the marketing executives in laggard organizations were unable to discuss what their organizations' plans may be, indicating this is an area not being communicated well. (Figures 14 and 15.)

FIGURE 12. HOW RELIANCE ON DATA ANALYTICS FOR DECISION MAKING WILL CHANGE OVER NEXT 3 YEARS

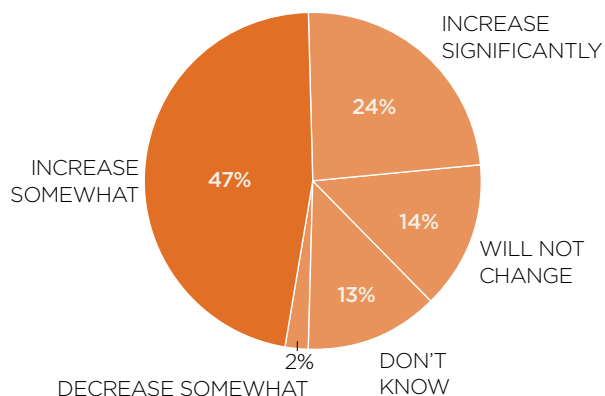


FIGURE 13. HOW RELIANCE ON DATA ANALYTICS FOR DECISION MAKING WILL CHANGE OVER NEXT 3 YEARS - BY STAGE OF DEVELOPMENT

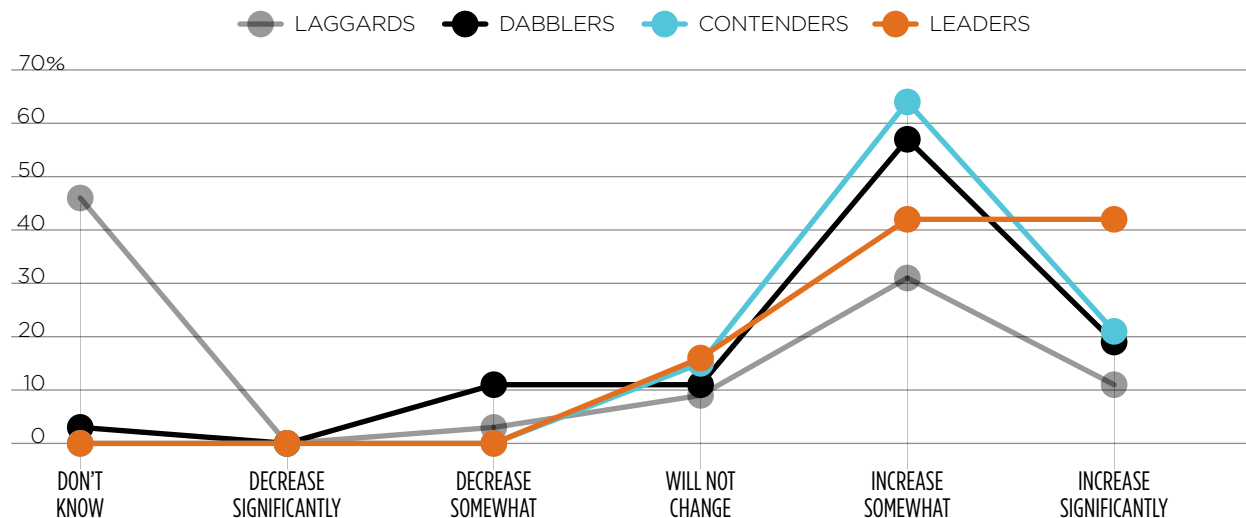


FIGURE 14. HOW SPENDING ON DATA-DRIVEN ANALYTICS FOR MARKETING WILL CHANGE OVER NEXT 3 YEARS

ALL RESPONDENTS

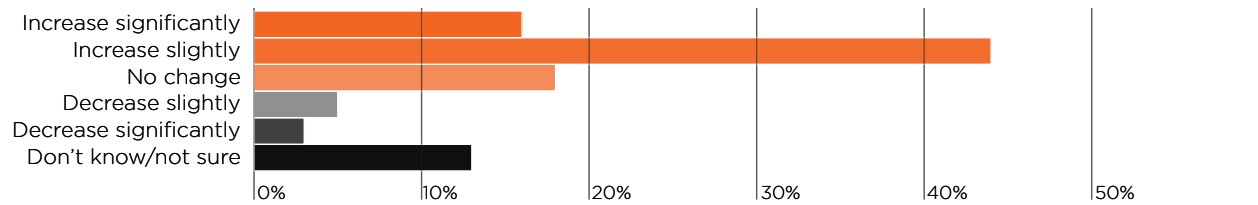
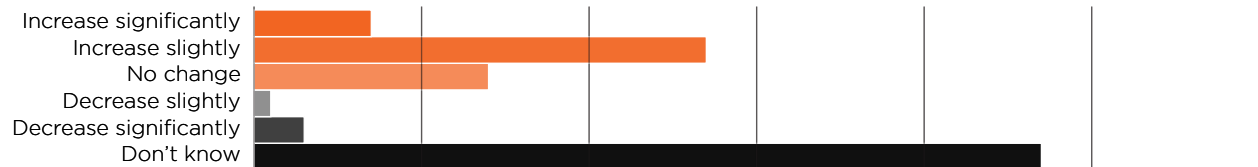


FIGURE 15. HOW SPENDING ON DATA-DRIVEN ANALYTICS FOR MARKETING WILL CHANGE OVER NEXT 3 YEARS — BY STAGE OF DEVELOPMENT

LAGGARDS



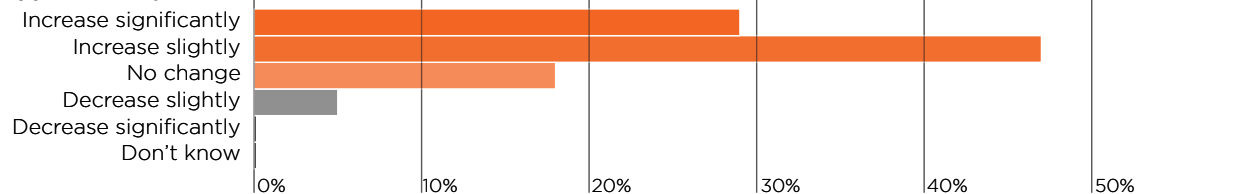
DABBLERS



LEADERS



CONTENDERS



DECISION MAKING AND ORGANIZATIONAL TRANSFORMATION

Data-driven marketing doesn't happen in isolation or solely within one section of the marketing department. Data-driven marketing is an enterprise-wide effort that requires data, expertise and innovative thinking from many parts of the enterprise. Successful initiatives require a corporate culture that is agile and open to learning, guided by technology. In addition, data-driven marketing leaders incorporate data analytics as early as possible into the campaign process to achieve the best results. For most of the companies leading in this practice, there is also tight integration between organizations' overall digital initiatives—adoption of big data, cloud, social and mobile—and marketing campaigns.

Executives report that as they move to data-driven approaches, a number of changes occur within their organizations. One of the most pronounced changes organizationally is the need to bring in new skill sets to be able to manage the process. For some organizations, there have been demonstrably greater returns from their marketing efforts. Significantly, data-driven approaches also boost the amount of automation being applied to more routine tasks associated with managing marketing campaigns, resulting in elevating employee roles to higher-level management tasks.

The need for new skills is most pronounced among the leaders profiled in the survey—63% report this requirement, versus 11% of the laggards. In addition, a majority of the leaders, 61%, report seeing greater returns on investment from their marketing

campaigns, versus only 9% of laggards. (Figure 16.)

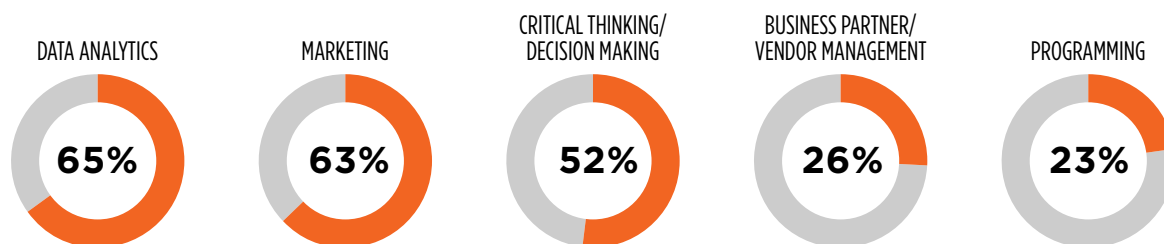
The survey also asked about skills associated with data-driven marketing. Close to two-thirds of executives say they now require data analytics as part of their marketing departments' stable of skills—even surpassing the need for basic marketing skills. A majority also point out that critical thinking is an essential component as well. (Figure 17.)

The change that enterprises will see as a result of a shift to a data-driven culture is greater “integrated thinking,” says Dhar. “The key is to recognize the different types of data that are available,” he says. “Traditionally, marketing has looked at data already in a quantitative form—loyalty cards, Nielsen and so forth. What's really exciting with the data right now is that it is in a very natural form—through footprints left online, browsing patterns

FIGURE 16. IMPACT OF DATA ANALYTICS ON ORGANIZATIONS—BY STAGE OF DEVELOPMENT

	ALL	LAGGARDS	DABBLERS	CONTENDERS	LEADERS
Resulted in new hires to bring in new skills	41%	11%	43%	48%	63%
Measurably increased the ROI of our marketing campaigns	35%	9%	32%	55%	61%
Freed up strategic employees from administrative tasks	30%	16%	35%	36%	45%
Automated ability to collect insights	25%	13%	27%	40%	29%
Changed our organizational structure	15%	6%	16%	14%	26%
Other	1%	1%	0%	1%	0%
No measurable impact at this time	9%	19%	8%	5%	3%
Don't know/unsure	13%	46%	0%	2%	0%

FIGURE 17. TASKS EMPHASIZED FOR DATA-DRIVEN MARKETING



and comments. Integration is needed to connect the dots. It's not about the dots; it's about taking the data and clearly understanding the business question. How do you have a good understanding of what pulls the heartstrings, not the purse strings, of the consumer? If you're too much caught up in the weeds of the data, you often don't see the 'why's.' You do need someone who can combine the analytics with a good fundamental understanding of consumer behavior, consumer psychology and consumer motivation."

Moving to a data-driven organization involves more than installing technology and optimizing a specific process. Effective data-driven campaigns require active engagement across the enterprise. However, the vision and the impetus needs to come from business leaders. "The first step is a cultural shift," says Glass. "It starts at the top, in the leadership in the company at large." The marketing organization itself, of course, needs to be fully engaged. They need to acknowledge "we are going to start to make decisions based on data," he adds. "Once you've made that first cultural change within an empowered set of people at the company, that's when change really starts to happen at the company. You have to determine, at that point, what decisions you are making, and in what areas a data-driven decision making process is going to be most impactful."

To build a data-driven culture, Glass advises starting with small demonstration projects that deliver quick wins, such as website analytics. Ultimately, this begins to help "change the rest of the culture from within. As people start to see examples of improved

decision making, improved outcomes and improved process revenues, then everybody starts to rally around the project." Predictive analytics is another example of a solution that will quickly catch the attention of the rest of the organization, he says. "These are so easy to implement, but incredibly powerful for a marketer. Marketers are able to not only target the right people in companies that those people work for, but also turn the right leads over to the sales team. As the sales team uses more

"The first step is a cultural shift. It starts at the top, in the leadership in the company at large."

- Russell Glass, head of B2B product for LinkedIn, and coauthor of *The Big Data-Driven Business* (Wiley)

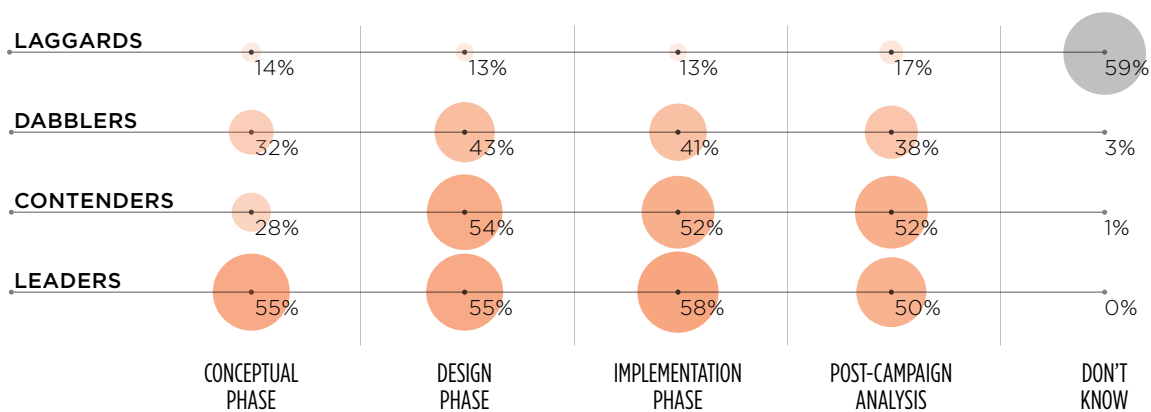
of them, they're going to have higher confidence in the quality of the leads marketing is driving, so they're going to pay more attention to those leads. That in turn is going to give marketing more credit and more visibility, and it will get more budget. It becomes a self-fulfilling cycle, based on just doing some simple data-driven marketing."

The survey looked at where data analytics are applied across four key identified stages in the campaign lifecycle. In most cases, the early stages of

FIGURE 18. PHASES WHERE DATA ANALYTICS IS EMPLOYED IN MARKETING CAMPAIGNS



FIGURE 19. PHASES WHERE DATA ANALYTICS IS EMPLOYED IN MARKETING CAMPAIGNS — BY STAGE OF DEVELOPMENT



marketing campaigns may still be the products of gut-level decision making. Overall, 30% say they are applying analytics to guide nascent programs as they are conceived, and 39% employ analytics to shape marketing campaigns that are approved and under way. (Figure 18.)

The survey confirms there's a need for a data-savvy culture to achieve maximum returns on campaigns. A majority of the leaders identified in the survey report they employ data analytics early in the process. Fifty-five percent state that data analytics are used to guide the process when campaigns are first conceived, and the same number also apply analytics to help design the program. (Figure 19.)

Understanding where people are within the buying process is an important part of data-driven marketing. While consumer purchasing habits are relatively straightforward, business purchases are multi-stage processes, Glass says. "You need to understand who these people are in the business world, and where they are in that buying process," he

The leaders in the survey—those enterprises who are well ahead with data-driven marketing efforts—demonstrate far greater flexibility to change in their marketing efforts.

FIGURE 20. CHANGES WITHIN MARKETING CAMPAIGNS TRIGGERED BY DATA ANALYTICS

	ALL	LAGGARDS	DABBLERS	CONTENDERS	LEADERS
Changed targeting strategies	38%	17%	46%	55%	47%
Extended or repeated a campaign	36%	13%	27%	57%	58%
Altered a campaign	34%	13%	30%	52%	47%
Changed messaging direction	32%	11%	38%	47%	42%
Altered or shifted content	25%	10%	14%	39%	34%
Shifted budgets	25%	13%	24%	36%	45%
Canceled or postponed a campaign	24%	10%	30%	29%	39%
Changed delivery channel	22%	9%	24%	30%	39%

says. “If they’re very early, you don’t want to serve them messages or content low in the funnel. It just doesn’t make sense to them to show them pricing on a product they’re not yet familiar with.”

The use of data analytics has changed the course of marketing campaigns, often while in midstream, the survey finds. Thirty-eight percent of executives say that their analysis of audience data has triggered a change in targeting strategies. The availability of data on a campaign has also led more than one-third to extend or repeat their campaigns. A similar number have altered the course of a campaign as a result of what data was telling them. (Figure 20.)

Close to one out of four executives say that a fresh look at the data has even resulted in their canceling or postponing a campaign.

The leaders in the survey—those enterprises who are well ahead with data-driven marketing efforts—demonstrate far greater flexibility to change in their marketing efforts. For example, a majority of leaders, 58%, report that data-based feedback has given them cause to extend or repeat campaigns. Only 13% of laggards have shifted campaigns this way. Likewise, 47% of leaders have altered campaigns already under way, versus only 13% of laggards. Data-savvy marketing organizations have even shifted funding in the midst of a campaign as a result of the insights data was proving them. (Figure 20.)

For the most part, there is some integration between digital strategies and overall marketing efforts. However, fewer than a third of executives say their organizations have achieved high levels of integration. Leaders, on the other hand, tend to have such tight integration between digital strategies and their marketing initiatives—66% of the leaders in the survey report that digital is a vital part of marketing, versus only 9% of laggards.

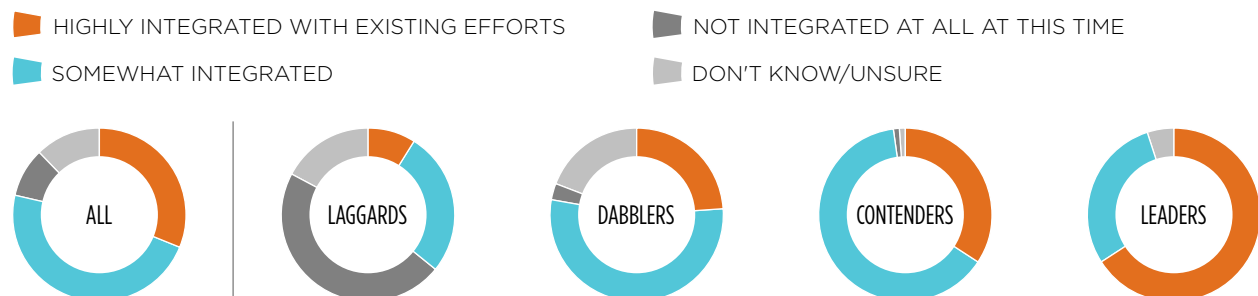
“You need to understand who these people are in the business world, and where they are in that buying process. If they’re very early, you don’t want to serve them messages or content low in the funnel.”

- Russell Glass, head of B2B product for LinkedIn, and coauthor of *The Big Data-Driven Business* (Wiley)

(Figure 21.)

“Data is used quite purposefully to continue to deepen the relationship between consumer and brand, or client and business,” says The Eisen Agency’s Roeser. “Remember, data use is not exclusive to a business to consumer relationship; it has major implications in B2B and in government to citizen as well. The more a given brand can deepen a relationship with a given customer, the less the cost of that engagement—it lowers the cost of goods sold.”

FIGURE 21. INTEGRATION BETWEEN MARKETING AND CORPORATE DIGITAL STRATEGY



LEADERSHIP AND SKILLS DEVELOPMENT

Despite increasing emphasis on data-driven marketing, the majority of responders do not offer training and education to develop data-driven marketing skills. Leaders tend to offer programs and encourage employee development in this area.

“This is the very early stage of data-driven marketing. Different companies are trying different things—this is still an early stage of experimentation.”

- Dr. Ravi Dhar, professor of management and marketing, and director of the Center for Customer Insights at the Yale School of Management

In a majority of cases, members of marketing departments are the most prevalent users of data analytics. Close to two-thirds of executives report their marketing staffs are steeped in analytics. Among the leaders in the survey, a more comprehensive story emerges. A majority report that all key players in data-driven marketing—CMOs, data scientists and marketing staff—are employing data analytics to drive their campaigns. (Figure 22.)

To date, Dhar says he has observed much of the decision making about data-driven marketing taking place under the aegis of the chief financial officer. “Initially, companies put data analytics under the CFO, because CFOs often were more interested in data than chief marketing officers—even though it’s marketing analytics.” In other cases, CIOs have been overseeing marketing data initiatives. He cautions, however, “This

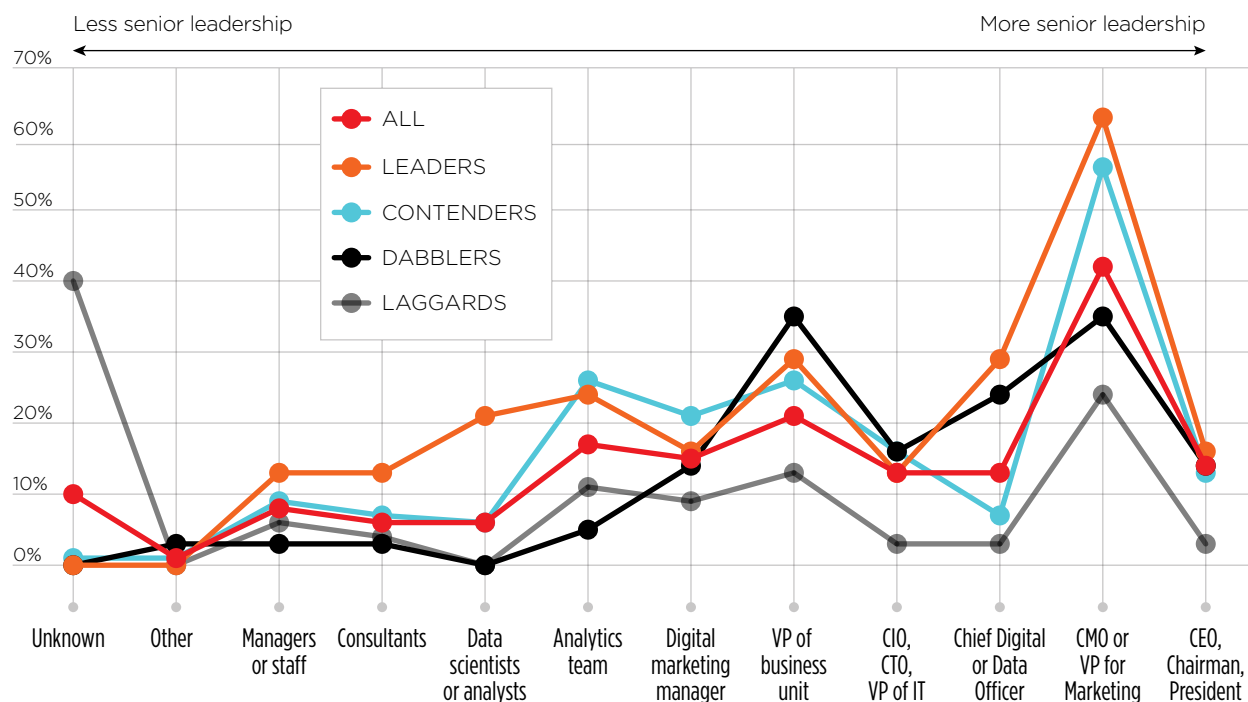
is also the very early stage of data-driven marketing. Different companies are trying different things—this is still an early stage of experimentation. They’re trying to figure out where these should belong. This is a capability that affects not only marketing, but affects many other services—such as customer service and the supply chain. Organizationally, there are many pros and cons of putting it under finance versus marketing or IT. It’s a real challenging question, and I don’t think people have cracked the code yet.”

As a result, businesses are challenged to move people away from narrow fields of specialization to broader, more holistic views of their enterprises. “You really need to be a master at multiple skills,” says American Greetings Properties’ Ross. “You need to have an understanding of how all of these little ecosystems work. People are expected to and need to understand

FIGURE 22. WHO USES DATA ANALYTICS DIRECTLY TO DEPLOY CAMPAIGNS?

	ALL	LAGGARDS	DABBLERS	CONTENDERS	LEADERS
MARKETING STAFF	63%	39%	65%	74%	79%
CHIEF MARKETING OFFICERS	37%	13%	35%	55%	63%
ANALYSTS OR DATA SCIENTISTS	34%	13%	32%	43%	63%
OUTSIDE AGENCIES/PARTNERS	15%	13%	11%	24%	16%
DON'T KNOW/UNSURE	13%	47%	0%	0%	0%
OTHER	2%	1%	5%	1%	3%

FIGURE 23. WHO LEADS DATA-DRIVEN MARKETING CAMPAIGNS?



“We need to know about consumer products, we need to know about social media, we need to know about retail. We need to know about a lot of different things that we can synthesize to figure out our best strategy.”

- Janice Ross, vice president of brand marketing at American Greetings Properties

FIGURE 24. TRAINING AND EDUCATION PROVIDED TO PROMOTE OR ENCOURAGE DATA-DRIVEN MARKETING APPROACHES—BY STAGE OF DEVELOPMENT

	ALL	LAGGARDS	DABBLERS	CONTENDERS	LEADERS
Online seminars	38%	14%	27%	47%	63%
In-house coaching/mentoring	30%	9%	22%	45%	58%
Comprehensive on-site training programs that may last up to several weeks in duration	23%	1%	30%	30%	45%
Off-site seminars	22%	7%	32%	31%	16%
Don't know/unsure	15%	51%	5%	3%	0%
None to very little, employees are on their own	13%	24%	14%	8%	3%
Comprehensive off-site training programs that may last up to several weeks in duration	9%	1%	19%	19%	13%
Support for college-level programs	7%	1%	8%	13%	8%

business and technology and how these intersect. Here, we need to know about consumer products, we need to know about social media, we need to know about retail. We need to know about a lot of different things that we can synthesize to figure out our best strategy. That's what's unique about our company today—we have a lot of people who aren't really specialists. They do cover and manage certain areas of our business, but they also have to be generalists who understand how their pieces fit into the big picture. You have to be a specialist and a generalist—you can't be just one or the other."

Data analysis skills are important to building a data-driven organization, but today's marketing professionals need a well-rounded foundation of knowledge and experience. Braun says, "On the input side, you need someone who knows what tools are available, understands the models and understands the limitations of the models. But they must also be able to think on their own about which problems are interesting to look at, or which variable to analyze or which relationship to look for. On the output side, you need someone who is savvy enough to communicate the results to a nontechnical audience in a nontechnical way. On the managerial side, even if managers are not doing analysis themselves, they need to know enough to manage people who are."

A majority of executives, 61%, say their data-driven marketing efforts are being led by senior management beyond the marketing departments (business unit VPs, CIOs, CTOs, CDOs, CEOs and so forth). About 42% of executives report that their chief marketing officer is leading the effort. CEOs and other top managers are barely participating—only 14% are leading data-driven marketing efforts.

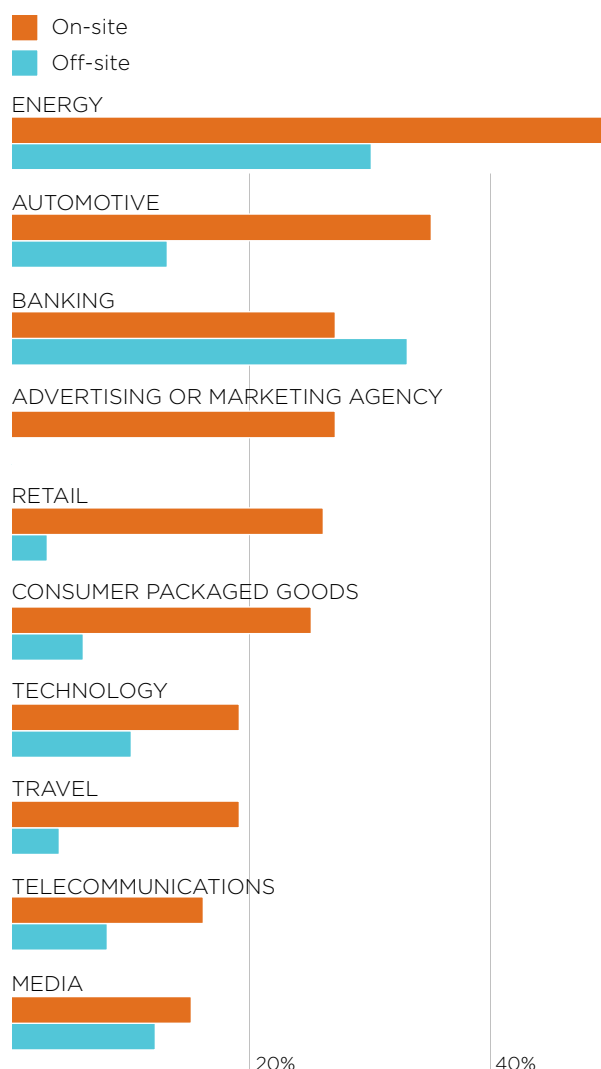
Those companies that are leaders in data-driven marketing have higher levels of involvement from top-level managers, however. For example, a majority, 63%, report their chief marketing officer leads the effort, as compared with only 24% of laggards. At the same time, one out of six leaders have the immediate involvement of their CEOs, compared with a scant 3% of laggards. (Figure 23.)

A committed workforce and teams of professionals can make data-driven marketing a success. However, moving to the new realms data-driven marketing offers requires training and coaching for all executives and employees involved in the effort. In most cases, training offerings are either through online programming or through more informal mentoring or coaching engagements. Leaders recognize the

importance of employee skills development, and they offer programs and encourage employee development in this area. Close to one out of four of the laggards, for example, admit they offer nothing in the way of training and education, versus only 3% of the leaders. (Figure 24.)

In terms of industry groups, the energy sector provides the most comprehensive, long-term training to employees for data-driven marketing skills. Fifty percent of executives in this sector say they provide on-site training that may extend over a period of weeks. Close to another one-third report that employees are sent out for long-term off-site training as well. The automotive sector follows, with 35% offering long-term, on-site training. Advertising and marketing agencies follow at 27%. (Figure 25.)

FIGURE 25. COMPREHENSIVE, LONG-TERM TRAINING - BY INDUSTRY



ENABLING TECHNOLOGIES

Until recently, businesses could get only a limited picture of their customers through mailing lists, transaction records and the results of market research polling. Such data could not be brought together to form a bigger picture of what motivates customers. Even when analysis was conducted with previous generations of desktop analytics tools, any resulting insights lagged in relevance, as the pace of changes in customer preferences continued to accelerate.

There are various pieces of the puzzle that need to be brought together to support and sustain data-driven marketing campaigns. Traditional marketing software may be effective at capturing or employing data for specific initiatives, mainly involving internally generated data, but is not capable of showing a 360-degree view of the interaction with customers. Today's solutions need to serve as data platforms and digital marketing hubs that enable marketers to leverage both traditional enterprise data stores and a broader, digital world that employs third-party data and other external information sources on customers. A customer may be interacting with a business on many different levels: responding to email, responding to catalogs, responding to mobile campaigns, linking to social media accounts, viewing videos, visiting physical retail locations.

Marketers need to understand which advertising and content touchpoints are resonating with customers. Data from a variety of sources—such as transaction systems, set-top boxes, call-center logs—needs to be integrated with existing data sets, such as cookies or online transaction information. This data needs to be centralized for clarity and accessibility to derive insights, take actions, monitor results and optimize. Instead of generating various and disconnected records, marketers can link customers to digital identifiers connected to various attributes such as additional third-party data assets, as well as digital advertising, such as search, display, video or mobile, joined with additional performance data.

Internal sources include transactional systems such as e-commerce platforms, point-of-sale terminals, weblog data, and internal

collaborative and communication systems such as email. It's also important to note that large amounts of data still reside on spreadsheets, and these documents need to be incorporated to understand customer trends.

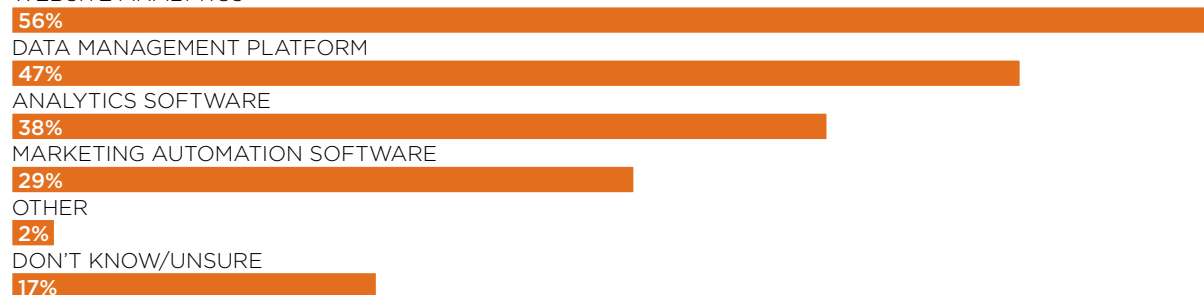
Marketers are increasingly delving into external data sources as well, including social media, mobile data, partner firms, external media data aggregators, market research firms and

“Data comes in all shapes and sizes, allowing marketers to truly drill down into finding those specific target publics, and target those publics with very specific and ongoing offers or calls to action.”

*- Rodger Roeser, CEO,
The Eisen Agency*

FIGURE 26. TECHNOLOGIES CURRENTLY EMPLOYED FOR DATA-DRIVEN MARKETING

WEBSITE ANALYTICS



email service companies. Collecting customer responses and preferences generates data that can help companies learn more broadly about their customers.

The key to all this is to have the ability to integrate data from a variety of sources, with a technology architecture that can bring these pieces of data together into a whole.

The challenge is to be able to bring all these disparate data sources into a single platform that provides a more complete picture of customers, their purchasing habits and preferences. A new generation of solutions—such as automated marketing solutions—emerging on the market now offers such capabilities. These offerings also include analytical software, which pinpoints the most appropriate custom advertisements to serve to customers, as well as extending offers.

“Data comes in all shapes and sizes, allowing marketers to truly drill down into finding those specific target publics, and target those

publics with very specific and ongoing offers or calls to action,” says Roeser. “Each time a consumer uses a rewards card, for example, that type of information is used to further target and tweak that specific person with specific offers. Notice what you buy online or what you click on in social media circles, then almost like magic, those types of offers begin to show up in pop-ups or skyscraper ads when you log on. Your specific behaviors are learned by marketers and used to continue to deepen an engagement.”

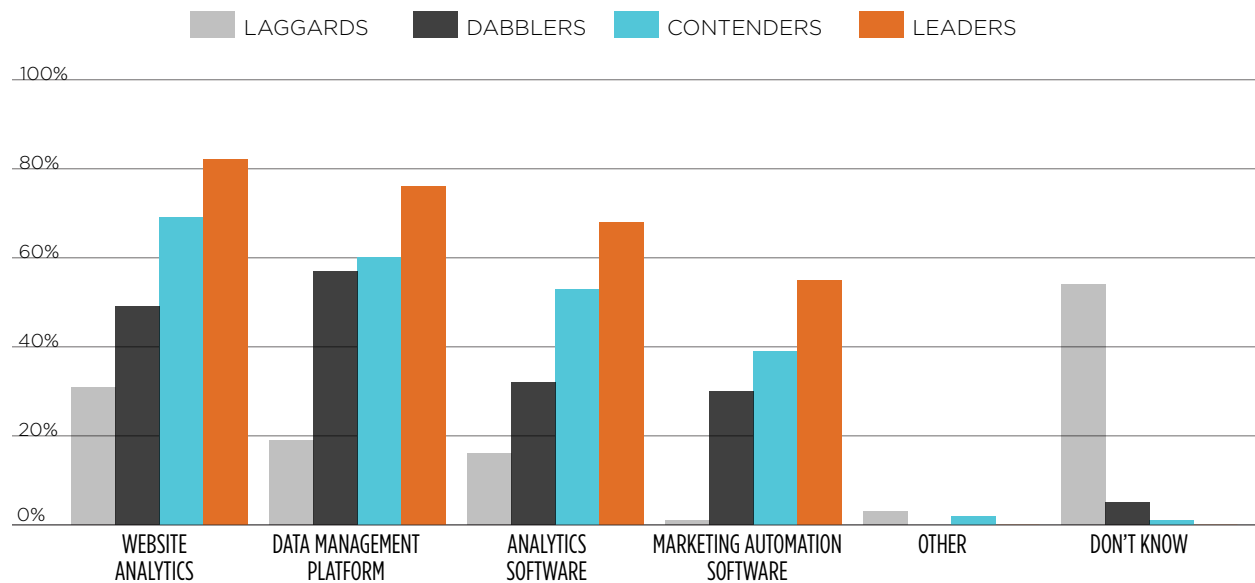
Today’s new generation of automated solutions also helps address the costliest aspect of data-driven marketing—the manual labor required to see these efforts through. Unless data-driven marketing is well integrated into organizations, these initiatives will remain siloed and disjointed, driving up administrative costs.

Various analytics, data platforms and analytics software are the primary tools being adopted to

“Notice what you buy online or what you click on in social media circles, then almost like magic, those types of offers begin to show up in pop-ups or skyscraper ads when you log on.”

- Rodger Roeser, CEO, The Eisen Agency

**FIGURE 27. TECHNOLOGIES CURRENTLY EMPLOYED FOR DATA-DRIVEN MARKETING
— BY STAGE IN DEVELOPMENT**



support data-driven marketing campaigns, the survey finds. Website analytics is the primary deployment of data-driven marketing seen at this time. Close to half of survey respondents are positioning their data platform for these efforts, while 38% are running analytics software on top of the data. (Figure 26.)

Leaders show a far greater adoption rate of these various technologies. Eighty-two percent are immersed in website analytics, and another three-quarters are working actively to support such efforts through their data management platforms. (Figure 27.)

BECOMING A DATA-DRIVEN MARKETING LEADER

The survey revealed the strategies and structures of organizations at the forefront of data-driven marketing. Here are conclusions and advice on how to become a leading organization, based on the experiences of these leaders:

1. ENCOURAGE SENIOR MANAGEMENT SUPPORT AND LEADERSHIP.

The leaders in the study have the active involvement of their top managers, often including the CEO. The advantages of data-driven decision making extend beyond marketing departments to other parts of the enterprise, such as finance, customer service and even product development. Data-driven marketing needs to be an enterprise-wide effort, since it involves data and expertise from many different areas. It may also be advantageous to have a chief data officer who can oversee and bring data management and analytics efforts together into a centralized place within the enterprise, where it can drive the most value for a brand.

2. PROVIDE TRAINING OPPORTUNITIES FOR EXECUTIVES AND STAFF ACROSS THE ENTERPRISE.

The leaders in data-driven marketing also are well ahead of their less-engaged counterparts in terms of support for training and education. To succeed, companies need skill sets in data management, data science and analysis. Perhaps just as important, decision makers need to develop their skills in critical thinking, to be able to look at information and ask what can be improved or can be done differently.

3. HIRE AND MOTIVATE THE RIGHT PEOPLE.

Any data-driven marketing effort requires people who appreciate and are trained in data analytics. “The more data-driven you become, the more you have a hunger for people who are comfortable with working with data,” says Glass. “They don’t need to be rocket scientists. But they do need to be comfortable with both analyzing and looking at data.” Just as important as technical skills is a sense of curiosity, he continues. “Curious people by nature are going to seek data. They’re going to look for insights that only data can provide them. When LinkedIn hires people, a lot of the characteristics you see are just curiosity—people who are generally curious about how the world works.”

4. HELP BUSINESS DECISION MAKERS BECOME COMFORTABLE WITH DATA.

The unique insights that result from data-driven marketing are more relevant than the sum of “big data.” To many businesspeople, data—particularly big data—may seem intimidating. But size and scale may not necessarily be the issue. “You can’t effectively work with big data until you understand how to work with small data,” says Braun. “The problem is not the size of the data set. It’s that many marketers have never learned how to parse what observed data patterns actually represent. Some patterns might be explained by observed customer activities, actions by the company and so forth. But most customer decisions are made for reasons that are completely unobservable to the company. A data-rich environment requires marketers who know how to separate the signal from the noise. Those statistical challenges are just as important for 1,000 records as they are for a million records.”

5. KEEP THE CUSTOMER FRONT AND CENTER.

While data-driven marketing opens up a wealth of new perspectives and opportunities for businesses, it's important to maintain a healthy balance between analytics and decision makers' experience. "Our marketing is both analytics-driven and listening to our audience," says Ross. "We look at Facebook, and we look at our social media platforms, and we listen to what they're saying." There's always a risk "of becoming too data-driven," Glass agrees. "If you spend all your time in analytics, and not listening to the customer, you may become myopic. Remember, data-driven marketing is customer-centric marketing. You're trying to solve problems for your customers, and doing that by analyzing data about their usage patterns and their interests. It's important to listen to your customer, while also using data to see what is happening in addition to what customers say."

6. START WITH SMALL, WINNABLE PILOT PROJECTS AND BUILD FROM THERE.

As shown in this study, most data-driven marketing and analytics take place against websites. This represents a key area to begin to develop data-driven expertise and build out. Develop a small-scale campaign to which data can be applied and tested. The results of such a smaller pilot effort need to be closely tracked and measured. By taking an iterative and incremental approach, the power of data-driven marketing will be apparent to the rest of the organization. "Start with wins that you bring to the rest of the organization, and start to change the rest of the culture from within," Glass advises. "For example, marketing departments can very inexpensively, or even for free, put analytics up on their websites, and start to measure the difference between one campaign and another on traffic to their website. That's the start of having outcome-based responses."

7. APPROACH DATA-DRIVEN MARKETING STRATEGICALLY.

The leaders in this survey—by a wide margin—consider their data-driven marketing initiatives to be a key part of their company's overall digital strategy. A data-driven marketing effort requires a strategic, shared vision, to ensure that business goals are being met. This also helps to align various departments behind the effort.

8. INTEGRATE DATA AND MAKE IT ACCESSIBLE TO ALL DECISION MAKERS WHO NEED IT.

Integrate data from various sources — such as customer surveys, transaction data, sentiment data and all other sources—to provide a single, consolidated dashboard from which decision-makers can easily view the impact of data-driven marketing on their businesses.

9. BUILD IN FLEXIBILITY, AND BE READY TO CHANGE RAPIDLY AS CIRCUMSTANCES REQUIRE.

A large number of the leading data-driven companies in this survey have altered, extended or even halted marketing campaigns based on ongoing analysis of project results. The agile marketing organization needs to be ready to change and shift course, and not be tied down to a campaign. At the same time, most leaders integrate their data analytics as early into the planning process as possible, to provide the best possible guidance to reach and engage customers. Staying balanced is also key, says Ross. "For me, as a marketer, I always want to take a more diversified and balanced approach," she says. "We don't want to put our eggs into any one basket. We still are experiencing a lot of growth in the data area, and there's still a lot for us to learn with the data and analytics that we're getting. As we grow with that information, it will have a bigger impact on our business decisions. But for us, there is an emotional connection to our brand. You have to take into account the emotion, and that doesn't always come through in data and analytics. We have to make sure we don't take out that human emotional connection that we need to make us as a brand more successful."

10. TIE SUCCESS METRICS TO BUSINESS RESULTS.

It's important to look at results in terms of impact on the entire enterprise. "Metrics should be around growth," says Dhar. "Can I link what I did to increased profitability, new customers or better pricing? It's very complicated to isolate the return on specific investments." Important measures that need to be part of data-driven marketing include "top-line growth, new products, new customers," he adds. "Ask, 'What have I done lately for the business that I can attribute to marketing insights?'"

ACKNOWLEDGMENTS

Turn and Forbes Insights would like to thank the following executives and experts for sharing their time and expertise:

Dr. Michael Braun, Associate Professor of Marketing, Cox School of Business at Southern Methodist University, and Program Chair of the Section on Statistics and Marketing, American Statistical Association

Dr. Ravi Dhar, Professor of Management and Marketing, and Director of the Center for Customer Insights, Yale School of Management

Russell Glass, Head of B2B Product, LinkedIn, and coauthor of *The Big Data-Driven Business* (Wiley)

Rodger Roeser, CEO, The Eisen Agency

Janice Ross, Vice President of Brand Marketing, American Greetings Properties

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