



# TOP MARKETING EXPERTS

Share Tips on Achieving Individualized Marketing



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# FOREWORD

Today's digital-first consumer communicates, watches, learns, listens, browses, and buys online—every day, right at their fingertips. In fact, a 2014 Nielsen study found the average American owns four digital devices and spends 60 hours per week consuming information, alternating among them. They very much define their own experiences before many brands even have a chance to introduce themselves. Marketers are racing to compete by addressing channels as they pop up—often losing sight of the customer, and failing to weave together a cohesive brand experience.

Conversely, the expectations of marketers to manage spend and resources, prove ROI, and execute a meaningful, omni-channel customer experience is increasingly amplified.

By integrating the wealth of insights on the known customer with the digital data that anonymous audiences are leaving behind, marketers can understand consumers as individuals. Empowered with those insights, they're better able to adapt to the individual's changing needs in real time. This agility enables marketers to consistently deliver an effective customer experience across all channels of choice.

Welcome to the age of Individualized Marketing.



Regards,

**David Panek**

Vice President, Marketing, Teradata Marketing Applications

Across his 24 years of experience, Dave has held leadership roles in marketing, product management, and consulting at both startups and companies including Aprimo, Unica/IBM, Oracle, SPSS, and Epiphany (now Infor). His domain expertise includes real-time marketing, marketing operations, campaign management, and digital marketing. David holds an MBA from Loyola University Chicago.

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Improve marketing agility and connect with customers as individuals across every channel with the Teradata Marketing Applications.

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Businesses in all industries are learning to use individualized customer data in their engagement strategies. However, accomplishing true individualization has been challenging for many companies because of a lack of resources; shortfalls in data quality, analysis, and understanding; and an inability to execute meaningful communications with consistency and relevancy. To better understand what is working, and with the generous support of Teradata, we posed the following question to over 45 experts who are heading up Individualized Marketing strategies:

## **What advice would you offer a fellow marketing executive to help ease the transition to Individualized Marketing?**

Although their approaches are as varied as their businesses and markets, these experts shared many insights. For example, you'll learn the importance of integrating individualized data across the enterprise for use in all engagement channels. It is the integration of that data that enables true one-on-one customer engagement, and makes Individualized Marketing especially powerful.

Of course, there is a lot more to it than that, and I'm confident you will find many valuable insights in this e-book—insights that will strengthen and enrich your own Individualized Marketing strategy.



All the best,  
**David Rogelberg**  
Publisher



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*Too many customer experience programs are not achieving their expected results and are starting to plateau. It is clear new thinking is required. The future lies in truly understanding customer behavior by identifying a customer's emotional, subconscious, and psychological experience. To do so, marketers need to be educated in the new discipline of behavioral economics. Doing so will enable them to analyze the data in a different way and reveal the real reasons for a customer's behavior. Armed with this information, they will be able to design individualized experiences that deliberately evoke desired emotions that drive value and move their customer experience to the next level.*



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**COLIN SHAW**

Chief Executive Officer, Keynote Speaker, Author,  
Beyond Philosophy



The future of Individualized Marketing is creating personal experiences for “everywhere customers” who toggle comfortably between apps, devices, and channels. The key to reaching everywhere customers is harnessing data to create contextual content that resonates during fleeting moments on platforms ranging from Snapchat to Facebook. Businesses such as Dunkin’ Donuts are starting to crack the code. Dunkin’ Donuts successfully uses Snapchat to engage with people by giving them tools to make their own snaps overlaid with Dunkin’ Donuts branding, which customers can use to get free coffee at a local Dunkin’ Donuts. These kinds of experiences require brands to crunch location data to share the right content at the right time.



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DAVID DEAL

Chief Executive Officer,  
David J. Deal Consulting

# CUSTOMER STORIES ADD MEANING TO INDIVIDUALIZED DATA



**DAVID  
EDELMAN**

Global Co-Leader, McKinsey  
Digital Marketing and Sales,  
McKinsey & Company

David Edelman is a recognized practitioner and global thought leader on digital transformation. He has helped organizations make the strategic, organizational, operational, and technology changes needed to drive digital sales growth. By setting strategic direction and working with clients to set up processes, analytics, and go-to-market programs, his teams deliver better performance and build clients' capabilities to sustain it. He is the author of two leading articles for the *Harvard Business Review* and a LinkedIn blog with more than one million followers.



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Individualized Marketing is a powerful tool for speaking to an individual customer throughout their experience with a brand. It involves a lot more than capturing and sharing individual data across channels, and it's more than simply aligning timely messages across channels.

"To be successful," says David Edelman, an early pioneer and longtime digital marketing practitioner, "you must understand the customer. You must recognize that not all customers reach their destination in the same way. You must be able to recognize where a customer is in their pursuit at any touchpoint in any channel. And you must be able to respond appropriately to that customer, through any channel, at any moment in time." Accomplishing that, he says, is the goal of Individualized Marketing.



*You must be able to respond appropriately to a customer through any channel, at any moment in time.*



## KEY LESSONS

- 1 Using a customer's digital footprints to identify the nature of their requirements, you can present them with appropriate content that fulfills their requirements.
- 2 Individualized Marketing enables companies to more effectively drive cross-sell opportunities and drive better engagement performance within segments.

# CUSTOMER STORIES ADD MEANING TO INDIVIDUALIZED DATA

Successfully executing an Individualized Marketing strategy begins with two fundamental understandings:

- **Your objective is to help customers at every touchpoint they have with your brand.** Each customer has objectives they want to achieve. Whether it is buying a product, gaining knowledge, or seeking entertainment, every customer is trying to accomplish something. Each individual takes their own steps in their own time, using their own criteria. It is the marketer's job to help guide the customer to a satisfactory outcome. "The mindset first and foremost is you are helping people," says Edelman.
- **The second thing is you must learn about the customer's experience.** This involves talking to people to understand their stories, why they look at the things they look at, why they make the choices

they make. "Capturing individual data is absolutely important and absolutely critical. But all too often, marketers are missing the story that gives the data its meaning," explains Edelman.

Once you do the qualitative research that illuminates customer stories and enables you to develop decision models, then you have a contextual framework for categorizing and interpreting certain kinds of behavior. "This adds tremendous value to the individualized data you capture" says Edelman. For example, you might identify categories of behavior like "entertainment-browsing" or "purposeful shopping." If you use a customer's digital footprints to identify the nature of their requirements and where they are in the process, you can present them with appropriate content that fulfills their requirements.

*"The mindset first and foremost is you are helping people."*

# CUSTOMER STORIES ADD MEANING TO INDIVIDUALIZED DATA

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*Capturing individual data is absolutely important and absolutely critical. But all too often, marketers are missing the story that gives the data its meaning.*

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Knowing how to respond to a customer at any moment in time is based on several factors, including what you already know about that person from prior engagements, what they are clicking on in that moment, their clicking patterns, and the path they are taking through customer touchpoints you are monitoring. It can also include other contextual data such as location and environmental factors.

Companies that do Individualized Marketing well think in terms of managing business segments and segment performance. They are able to more effectively drive cross-sell opportunities, and they can drive better engagement performance within those segments. For example, a retailer might identify several segments, such as the aforementioned

“entertainment-browsing” and “purposeful shopping.” Another one might be “moms who shop for everyone in the family but themselves.”

Edelman says, “If the retailer can get one of those moms to cross the aisle and begin shopping for herself, this would be a huge upside.” This approach could be successful if the retailer understands that segment behavior, they know this individual, and understand what is on this person’s mind. Using individualized data to identify a customer as one of those “moms who shop for everyone in the family but themselves,” the retailer is able to show that individual certain products and make deeper offers at just the right times and places to induce her to cross the aisle.



*Making the transition to Individualized Marketing starts with organizational buy in. As we've seen from the start of digital communication with customers, that takes big success stories from others combined with small success stories at home. A single, simple test can show a dramatic lift in response when using customer data in email communication. An A/B test can show the value of "Hello, Jim" on the home page. As interest grows, more systems can be integrated and the speed of moving up the customization maturity curve increases. Keep in mind that you are marketing and your current product is improved customer relations though Individualized Marketing. Show the benefits and convince key stakeholders.*



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**JIM STERNE**

Chairman,  
Digital Analytics Association



## EDWARD NEVRAUMONT

Chief Marketing Officer,  
A Place for Mom

Edward Nevraumont is focused on helping companies grow. He led the turnaround of A Place for Mom, he was an executive at Expedia, and he spent four years at McKinsey working globally in locations including Australia, Nigeria, Denmark, and the Congo. He is author of *The Ultimate Improv Book*. His next book is an exploration of the counterintuitive notion that being good is better than being excellent. He has an MBA from Wharton and an undergraduate degree in physics.



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Edward Nevraumont, chief marketing officer for A Place for Mom, says that Individualized Marketing is important to a business like his, which helps elders find living situations based on their needs and preferences.

“The advisor-family relationship is the core of our business,” says Nevraumont. Establishing and cultivating that relationship, and providing good service to customers, only happens through an in-depth understanding of each person.

Nevraumont describes three factors that make Individualized Marketing possible in his business:

- **Use opt-in, customer volunteered information.** This information is usually initially gathered on the website by offering choices and using filters, but the real detailed personal information comes through one-on-one engagement with an adviser.



*You need to identify the need states of your customers and then tie your marketing messages to as many of those different need states as possible.*



## KEY LESSONS

- 1 Establishing a personal relationship, and providing good services to customers, only happens through an in-depth understanding of each person.
- 2 Identifying the need states comes largely through analyzing customer-volunteered information.

# INDIVIDUALIZED MARKETING WORKS DIFFERENTLY IN DIFFERENT MARKETS

“We have customers talk to advisors, and we ask them what exactly they want in a living situation.” The advisor collects lots of personal information, such as whether they prefer a small, intimate community, or a big community with lots of activities. Do they play bingo, or do they like gardening, or do they like great views, or do they like swimming. Do they have acuity needs, what are their budget requirements, and a great deal more. Based on all this information, the advisor makes recommendations for places to visit, and then captures feedback from those visits. “It’s letting customers decide what they want rather than trying to guess based on incomplete information,” says Nevraumont.

- **Market to the different need states.** Nevraumont says, “You need to identify the needs states of your customers and then tie your marketing messages to as many of those different need states as possible.” In the case of A

Place for Mom, that’s a matter of understanding needs expressed by customers, and being able to satisfy them by saying yes, we can help with independent living, we can help with senior living, we can help if you are looking for a place for your mom, or yourself, we can help with home care, we can help if you want to do gardening, we can help all of those need states. Identifying the need states comes largely through analyzing customer-volunteered information.

- **Make your message relevant to what people are looking for at that moment in time.** “If they signal their interest in something, you must respond directly to that individual interest,” says Nevraumont. For example, if someone searches on Google for cheap umbrellas, your ad should show them cheap umbrellas. If you show them luxury umbrellas, or a generalized list of accessories, you will be less likely to convert.



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If they signal their interest in something, you must respond directly to that individual interest.  
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*Data-driven marketing is not static. It's a continuum, with businesses at different levels of maturity. Larger companies continue to work toward predictive analytics and customized, real-time interactions that leverage behavioral, contextual, and other audience data. Smaller businesses might just be starting out on their DDM path with individualized, targeted offers or contextual marketing. Wherever you are, keep pushing the ball forward—don't just collect the data, work to understand it, leverage it, and automate it. DDM is here to stay.*



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**BRENDA STOLTZ**

Founder and CEO,  
Ariad Partners

# INDIVIDUALIZED MARKETING IS ABOUT MARKETING TO REAL PEOPLE



**JOSEPH  
COLE**

Vice President, Marketing,  
Avanoo

Joseph Cole's early career began at Paramount Pictures. He then became a "Mad Man" working with many of today's leading ad agencies and brands. Cole has now transitioned to the client side and is the vice president of marketing for Avanoo. Joseph's marketing strategies encompass a blend of human behavioral science, inbound marketing, design, and grit. Cole grew up in New Zealand, currently lives in San Francisco, and frequents Africa where he's involved in elephant and rhino conservation.



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Joseph Cole, vice president of marketing for Avanoo, says that the best advice he can give to marketers making the move to Individualized Marketing is to understand their buyer persona. "I think a lot of marketers forget that we're all human and we're marketing to people. It's extremely important to understand behavioral psychology," he says. "It doesn't matter if you're marketing to a big brand or a small brand, big cooperation or small cooperation, or if it's business to business or business to consumer, what really matters is that you understand what motivates your buyer."

Understanding that motivation can be tricky, but Cole suggests the best way to learn that motivation is just to have a conversation with the buyer. "You've got an existing customer database of who your ideal customer is. You should speak to them. Find out what it is that they want in life just in general, understand their pain points in their personal life but also the pain points in their business role, and understand why or what sparked their interest with the product you're trying to sell."



*I think a lot of marketers forget that we're all human and we're marketing to people.*



## KEY LESSONS

- 1 It's easy to forget that you're not marketing to a persona. You're marketing to actual people, and individualizing that marketing creates deeper, more meaningful relationships.
- 2 Individualized Marketing might lead to fewer leads, but those leads will be better qualified.

# INDIVIDUALIZED MARKETING IS ABOUT MARKETING TO REAL PEOPLE

“That can be as simple as putting together a quick and dirty survey or questionnaire,” says Cole. He points out, however, that even a simple survey should be sent to your best customers. “Otherwise,” he points out, “The types of responses that you’ll get back are probably not the types of responses that you need.” Collecting that data will help you develop and articulate an Individualized Marketing message that speaks to customers on a one-to-one level.

“Individualized Marketing is really more of a psychological analysis where you can really understand the right language

and how to reach the buyer,” says Cole. “Really understanding what the motivations are so that you can understand what the triggers are and what is going to get them to react to something that you’re sharing with them. What matters is that you understand who it is that you’re marketing to.”

The next step to Individualized Marketing, according to Cole, is creating relevant content that informs the buyer and helps supports their process with your brand. He says it helps to have a marketing funnel that moves the buyer through each stage in the process.

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*Individualized Marketing is really more of a psychological analysis where you can really understand the right language and how to reach the buyer.*”

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*The best way to build that relationship is by giving your prospects and customers value in exchange for what they'll give you.*

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“The content has to be of value because customers are not going to give you something—like their name and their email address—without you giving them something of value in return. It’s about building that relationship, and the best way to build that relationship is by giving your prospects and customers value in exchange for what they’ll give you—the information that you’re looking for to qualify them.”

The key to success, says Cole, is to remember that as you move to Individualized Marketing, the nature of your relationship with your customer changes. Speaking from his

own experience in online and television marketing, he explains, “You can do a large brand campaign and get a ton of leads and that might seem great. You might get a lot of people coming into your funnel, and once you become more individualized, you might not see as many leads because you’re speaking to a specific person with a specific pain point. But the relationship is a better relationship. You’re not going to see as many leads but you’re going to see better leads. It’s kind of like a ‘duh’ moment but I think it’s important to see that.”



*Individualized Marketing replicates what all good marketing should do: engage a prospect in a conversation. Today, technology allows us to understand the needs and desires of a prospect and to customize our marketing accordingly. There is no real mystery to Individualized Marketing except why more people don't do it. It's only common sense to think that if you market individually to people, communicating with someone where they are in the buying cycle, you will do far better than talking to everyone the same way. It's good conversation and good marketing.*



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WENDY MARX

President,  
Marx Communications

# SUCCESSFUL INDIVIDUALIZED MARKETING REQUIRES HUMAN SENSITIVITY



## WENYU ZOU

Assistant Vice President,  
Global Digital Marketing,  
Kiehl's Since 1851 (a subsidiary  
brand of L'Oreal)

Wenyu Zou serves as the head of global digital marketing at Kiehl's. Her expertise lies in global integrated marketing communications thanks to her years of experience in brand building with fully integrated digital force both in the United States and her native China. She has produced award-winning brand campaigns in her recent practices in the United States and has successfully launched brands, including Giorgio Armani Cosmetics and Kiehl's, and rapidly led them to become market leaders in China.



Website

Brands making the transition to Individualized Marketing should consider not only how it can help them to generate more business, believes Wenyu Zou, but also how they can add true value to people's lives. To do so, it's important to engage consumers in a way that acknowledges their unique interests and preferences, thereby fostering long-lasting loyalty.

Says Zou, "It's really easy to drown in the data and stereotype people, but humans have feelings." For example, many people might appreciate the convenience of Amazon's recommendation feature for books, which tailors suggestions to them, because they feel comfortable knowing the suggestions are based on their book purchasing record and the offer feels helpful rather than intrusive.

Consumers also want to be in control of their personal information and how much of it is shared.



*It's really easy to drown in the data and stereotype people, but humans have feelings.*



## KEY LESSONS

- 1 Although they appreciate the convenience of individualized messaging, consumers want to feel that they are in control of their personal information.
- 2 When building a brand model, it's important to account for the influence that marketing messaging may have already had on your existing customers.

# SUCCESSFUL INDIVIDUALIZED MARKETING REQUIRES HUMAN SENSITIVITY

For example, while recently browsing her social feed, Zou suddenly saw a promotional post in Chinese, her native language, from one of the banks she does business with. "It's my own social feed, and it stands out because it's in a different language and all my settings are in English," she explains. "I don't enjoy the feeling of being overly exposed. They are sending information to me in a way that makes me feel like I am being stalked. It's not a good feeling."

Zou also believes that it's important to consider how to create relevant predictive data. Historical data most often forms the basis of such predictions, she says, but, "What's most important is what's next: the predictive part. Our further relationships with the consumer actually start in the future."

She recommends building a brand model with three layers of data. The first layer is a behavior model of your existing customer base and how they are interacting with your brand. The second layer involves lookalikes, similar to your existing customers, who could potentially become your customers as well. These first two layers, although helpful, also pose an inherent challenge. "They can be a bit deceiving because the first layer, your consumer's behavior, reflects the results of your brand influence on them. If you keep on pushing anti-aging skincare products, for example, then you will find your consumers value anti-aging products more than they otherwise might," Zou explains. As a result, the data might not fully reflect the complete profile of the consumer that you want to retain and recruit.

*“What's most important is what's next: the predictive part. Our further relationships with the consumer actually start in the future.”*

# SUCCESSFUL INDIVIDUALIZED MARKETING REQUIRES HUMAN SENSITIVITY

To mitigate that potential problem, it might be helpful to consider adding a third layer - a broader set of human behavioral data. For example, a consumer might be interested in wedding-related content for quite a while, but after several years, her interests might have changed and she is now particularly interested in baby-related content. At this moment, seeding wedding-related content won't make sense anymore. On the contrary, the brand intention of a continuous communication will very likely turn the consumer off because it is exactly the opposite of a true personalized consumer experience.

Finally, Zou feels it is especially important to keep a strong focus on execution when making the transition to Individualized Marketing. "I think most people use data to inform execution. The case mix index team and the analysts are often working on their marketing message before the creative is fully developed. When it goes to production and distribution, people often don't go back and cross-check to make sure the end delivery hits the mark," she says.

For this reason, she advises that brands make sure to validate their execution against the original data and insight before launching. Doing so will help brands avoid delivering messaging that, because it is not fully relevant to the target audience, could lead consumers to lose interest in the product or even the brand. A recent case is that many brands jumped on the "Lunar New Year" trend to celebrate the "Year of Monkey" with their targeted Chinese (heritage) consumers. However, a big percentage of the brand creative with a "Monkey" image actually led to criticism as the "Monkey" was not interpreted in an aesthetic that's friendly to the targeted audience. The original insight is great, but the end execution failed the total effort.

Overall, if marketers adopt an approach that incorporates human sensitivity and makes sure that consumers feel the company cares about them, Zou advises, there is potential to see great success with Individualized Marketing. In taking these steps, marketers can create a brand that makes consumers feel that the company really knows them and delivers value to them, generating strong and lasting customer loyalty.



*Marketers with smart data insights to create Individualized Marketing are like snipers using high-powered night vision goggles.*



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## DOUGLAS BURDETT

Principal, Artillery, and host of The Marketing Book Podcast,  
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# IN INDIVIDUALIZED MARKETING, DATA IS EVERYTHING



**GABRIEL LAZARO**

Vice President, Head of Digital for Latin America, Chubb

With top positions at Jamba (Rocket Internet embryo) & Fox Mobile Group (News Corporation) and AIG, Gabriel Lazaro developed global digital marketing strategies. In January 2016, Lazaro joined Chubb, the world's largest publicly traded property and casualty group, as vice president head of digital for Latin America. Cofounder of StartupHub.NYC with the objective of supporting international tech startups that want to accelerate their landing, scaling, and fundraising in the United States, Lazaro has served as an advisory board member and angel investor.



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When it comes to Individualized Marketing, it is important to recognize the customer is not thinking about which department they are engaging with when they do business with you. They simply view the interaction as if they are engaging with your business and your brand.

“When the customer needs to solve a problem or is looking for a specific product or service, they don't care what business unit they're dealing with,” says Gabriel Lazaro, vice president head of digital for the Chubb group. However, addressing customers as individuals is a challenge for many companies because of the way organizations traditionally work. Each operational unit within the enterprise works in semi-isolation with its own agenda. “The challenge is to put the customer into the center of the business, and then develop products, services, and marketing activities around the customer,” says Lazaro.



*The challenge is to put the customer into the center of the business, and then develop products, services, and marketing activities around the customer.*



## KEY LESSONS

- 1 Adding value for the customer is the ultimate goal.
- 2 Effective Individualized Marketing keeps customers more deeply engaged with a product or service, beyond price or other factors that are also important.

# IN INDIVIDUALIZED MARKETING, DATA IS EVERYTHING

To do so, Individualized Marketing goes beyond the idea of traditional marketing. The company needs to develop a customer-centric mindset that sees the customer relationship from a product perspective, a service perspective, and a marketing technology perspective. "You need to coordinate the approach with the rest of the departments to make sure that this interaction is unique and really adds value to the customer," says Lazaro.

This approach is especially important in the insurance business, where every quote

is unique, depending on the products and the customer. To do so, you must have data that is unique to the customer, and that data must integrate across the enterprise. "Data is everything. We have thousands of data entry points," says Lazaro. Some data comes from the customers themselves through traditional entry points such as account creation, the call center, and the quote center. A lot of it comes from watching how customers interact across the entire Digital ecosystem like the website, mobile or social media.

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*You need to define key performance indicators in everything that you're doing, and then constantly test and measure those KPI.*

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# IN INDIVIDUALIZED MARKETING, DATA IS EVERYTHING

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*If I am a customer, I want to have the feeling the company understands me, and they are bringing me something related to my need.*

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“You need to define key performance indicators in everything that you’re doing, and then constantly test and measure those KPI,” Lazaro says. “You are always adding variables and testing to see which individualized elements work with a customer and which ones do not.” Sharing data across the organization is a critical success factor. Lazaro says, “There need to be bridges between the different departments and data entry points so that data flows fast and smoothly.” This method makes it possible to look at individualized data holistically in the context of providing the greatest value to that customer at any moment in time during an engagement—and to move nimbly in adjusting resources and spend for the best result.

Adding value for the customer is the ultimate goal. This means making relevant offers that relate to what the customer needs, and making

those offers at the right time, in the context of the right products, and in the appropriate channels. It means giving value to the customer at every moment of their engagement. “If I am a customer, I want to have the feeling the company understands me, and they are bringing me something related to my need,” Lazaro explains.

The value of Individualized Marketing to the business is building stronger, longer-term customer relationships. “If I’m not a customer but they know and understand me, I’m more likely to purchase a product,” he says. “If I’m already a customer and they contact me knowing who am I and what my needs are, then probably I will buy more.” Effective Individualized Marketing keeps customers more deeply engaged with a product or service, beyond price or other factors that are also important.



*We have everything we need to personalize every single customer and prospect interaction right now. It's not the future; it's right now! We have the technology, the data, the customer insights, and the content. Operationalizing microlevel customization will continue to separate winners and also-rans in business-to-business marketing throughout 2016.*



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MATT HEINZ

President,  
Heinz Marketing, Inc.

# INDIVIDUALIZED MARKETING REQUIRES A FOCUS ON CUSTOMER PAIN POINTS



**JARED  
JOHNSON**

Principal,  
Ultera Digital

Jared Johnson, principal and digital marketing senior advisor with Ultera Digital, is a thought leader and consultant with 13 years of experience researching, recommending, designing, and developing digital marketing solutions and strategies for health care and technology organizations, from start-ups to the Fortune 500. He is a blogger, speaker, and host of the *Health IT Marketer Podcast*.



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When making the transition to Individualized Marketing, Jared Johnson believes it's necessary to shift from a company-centered approach to one that puts the customer at the heart of the conversation.

"Figure out how you are addressing your customer's pain points," he advises, "Because most people are no longer satisfied with finding out about your product's features and benefits."

Taking an Individualized Marketing approach involves understanding what your target audience wants and needs to overcome, and then determining the best way to meet those needs.

In doing so, explains Johnson, "You're telling them first and foremost that you care about them, but you're also making an emotional connection because you've given them something useful before they've bought your product." That positive emotional connection can inspire brand loyalty and lead to improved sales.



*You're telling them first and foremost that you care about them, but you're also making an emotional connection because you've given them something useful before they've bought your product.*



## KEY LESSONS

- 1 An Individualized Marketing approach requires putting the customer's needs and concerns at the heart of the conversation.
- 2 By answering customers' questions and addressing their pain points, a company can create an emotional connection that inspires brand loyalty.

# INDIVIDUALIZED MARKETING REQUIRES A FOCUS ON CUSTOMER PAIN POINTS

Johnson saw this firsthand when he was working with a Fortune 500 medical device company. The entire marketing team for the division, a unit of about 100 people, was undergoing the transition to Individualized Marketing at the time. The company sold devices to doctors that were used in an invasive medical procedure that was often very uncomfortable and expensive. Because these devices were implanted in the body for a long period of time, prospective patients tended to have questions and concerns.

Although, technically, the doctors were the customers because they were purchasing these devices, the company chose a patient-oriented focus. Explains Johnson, “Instead of centering its message on the features and benefits of the

implant, the company focused on answering patients’ questions.” As part of that strategy, the company created a community of former patients to serve as patient ambassadors. Having undergone the operation associated with the device themselves, the patient ambassadors understood what questions new patients might have and could share their positive experiences with the implant with prospective patients.

“The patient website that the company created to answer those questions was based on pain points—things that were of concern to those patients,” says Johnson. The company understood that if it could answer prospective patients’ questions, those patients would feel much better about the operation.

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Instead of centering its message on the features and benefits of the implant, the company focused on answering patients’ questions.  
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*The patient website that the company created to answer those questions was based on pain points—things that were of concern to those patients.*

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This customer-centric approach led to increased sales. Explains Johnson, “At the end of the day, it affected how many devices were sold. If patients weren’t willing to sign off on the operation, then the company wasn’t going to sell those devices.” The company was able to do this because it had data indicating how many patients it expected to reach by focusing on patients’ needs instead of speaking exclusively to the doctors. By adjusting its approach to focus on the end user of the product rather than the doctors to which the product was sold, the company was able to achieve better results.

Although this strategy can be applied to many marketing methods, Johnson believes it is especially effective when applied to content marketing. Consumers are searching for information that answers their questions, helps them become more knowledgeable about an issue that is relevant to them, or solves a pain point they are experiencing. Content that addresses their needs and delivers consistent value to them is one of the most valuable investments a marketer can make.



*Data is the difference between art and science. Data is the objective fact that can prove the true worth of marketing's value to an organization.*

*We do not have a "lack of data" problem. We have a "lack of understanding data" problem.*



 |   
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# MATHEW SWEEZEY

Principal of Marketing Insights,  
Salesforce



## JUSTIN STEINMAN

Chief Marketing Officer,  
GE Healthcare IT

Justin Steinman is the chief marketing officer for GE Healthcare IT, a \$1.8 billion division of GE Healthcare. Steinman previously served in a variety of operational and marketing roles at GE Healthcare. He started his career at Accenture and then worked at Novell in multiple sales and marketing roles, culminating as the vice president of solution and product marketing. Justin holds an MBA from the MIT Sloan School of Management and a BA from Dartmouth College.



Twitter



Website



Blog

An individualized approach to marketing offers many benefits, according to Justin Steinman. His organization, GE Healthcare IT, focuses on business-to-business software sales. In many cases, a group of important stakeholders forms an account, such as a chief information officer, a chief financial officer, a chief medical officer, and others. His team must, accordingly, work to form a deep understanding of each potential client's unique needs in an individualized way.

Explains Steinman, "If we don't know everything about an account and tailor our message to them, then we're not going to be successful." To get to that stage, it's necessary to begin marketing with somewhat generic content early on in the marketing process, he advises, to get people to self-identify. Once some initial data has been gathered, it then becomes easier to form a more comprehensive understanding about each potential client.



*If we don't know everything about an account and tailor our message to them, then we're not going to be successful.*

## KEY LESSONS

- 1 An individualized approach is necessary to truly understand your customers' needs.
- 2 Retargeting allows a brand to display digital advertisements to potential customers who have visited specific websites.



To further understand emerging customer needs surrounding cloud technology, for example, Steinman's team has used the insight provided by their marketing automation software to identify which customers showed the greatest interest in the cloud, whether by downloading a white paper or attending a webinar, and then reached out to them directly.

Says Steinman, "We called them up and said, 'We've seen you've been interested in the cloud. We actually don't want to sell you something. Would you be ok with us coming and talking to you simply just to learn your pain points and how we can help you?'"

As a result of those individual conversations, Steinman's team was able to share the knowledge

they gained about customer needs with the product management teams. Using that valuable insight, they were able to develop a new product that is scheduled to ship later this year.

Steinman and his colleagues plan to further develop their Individualized Marketing strategy by increasing their digital marketing efforts in the coming months. In particular, they aim to expand their Individualized Marketing into the area of awareness. Instead of traditional online advertising, in which they would simply buy an ad on a website, they will instead invest in a more specific method: retargeting.

*“Would you be ok with us coming and talking to you simply just to learn your pain points and how we can help you?”*

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Through retargeting,  
we will be able to  
deliver GE Healthcare IT  
digital advertisements  
to potential buyers who  
have visited certain  
websites.”

As Steinman explains: “Through retargeting, we will be able to deliver GE Healthcare IT digital advertisements to potential buyers who have visited certain websites.” For example, people who regularly visit two or three particular health care IT websites will then start seeing advertisements for GE Healthcare IT on all sorts of websites, including even news or entertainment websites.

In addition, Steinman's team plans to use social media tools aimed at specific profiles of potential buyers based on information in their profiles. They will use that technique as well as retargeting to drive clickthroughs to digital landing pages, where they can capture more granular and specific lead information for better Individualized Marketing to future customers.



*In an age of ubiquitous connectivity where consumers can discover content, interact, and transact anytime, anywhere, traditional digital marketing falls flat. Today's consumers have become numb to brand content and ads, seeking more individualized experiences on their journey to find answers. The solution? Data-driven marketing that provides insight into exactly which triggers will satisfy buyers from the unaware to brand advocates.*



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LEE ODDEN

Chief Executive Officer,  
TopRanking Marketing



*The impact that data-driven marketing can have on your business is not directly related to the scale or quantity of the data you collect. It's not even directly related to the insights you derive from the data. Instead, the impact is directly related to the actions you take based on the data. Marketers who take action will always outperform marketers who get bogged down in analysis paralysis.*



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# JAMIE TURNER

Chief Executive Officer,  
Sixty Marketing



*Good salespeople have always known the power of individualized conversations. Marketers now have the technology (and the mindset) to drive individualized communications. I believe that some of the greatest benefits will come from sales and marketing working together to capture and apply the advanced intelligence that can drive new levels of customer relevance and intimacy. This has the potential to go far beyond traditional demographic segmentation by leveraging customer traits, behaviors, and activities to deliver precise, relevant messages and stimulate a stream of interaction.*



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**BOB APOLLO**

Founder,  
Inflexion-Point Strategy Partners

# INDIVIDUALIZED MARKETING REQUIRES A FOCUS ON THE HUMAN CONNECTION



**ANNIE  
GHERINI**

Head of Marketing,  
StumbleUpon

Annie Gherini leads the marketing team at StumbleUpon, Inc. for both consumer and business-to-business products. Prior to joining the StumbleUpon team, Anne worked with large entertainment brands, such as Sony PlayStation and Paramount Pictures, and led the marketing for several early stage mobile and social start-ups. Her focus has been on coupling data-driven performance campaigns with strategic and engaging brand initiatives. Anne is a thought leader in understanding how to market and connect to the millennial generation.



Twitter

In making the transition to Individualized Marketing, one of the most important lessons Annie Gherini has learned is that you can't focus *purely* on data. She notes that her company is fortunate to have some of the best data scientists on staff and that their expertise is extremely valuable. She feels, however, that marketers need to remember the human connection while keeping the numbers in mind.

Gherini explains, "Oftentimes, marketers make decisions based purely on data. We have to step back and remember that these are not just "users"— there are actual people behind all these numbers." She advises that marketers need to think through the experience users are having, not simply what the numbers mean and what the data proves.

The marketing space is transitioning from a strict focus on eyeballs and impressions toward a stronger emphasis on engagement and experiences, according to Gherini.



*We have to step back and remember that these are not just "users"— there are actual people behind all these numbers.*



## KEY LESSONS

- 1 Although data is extremely valuable in informing strategies for Individualized Marketing, it is also important to remember the human connection.
- 2 Marketers have responded by adjusting their messages to be an invitation to engage with the brand rather than a hard sell.

As a result, research is beginning to center on understanding who these different types of people are, and then taking steps to ensure that each and every experience is positive and engaging for them.

Gherini has seen this development take shape at StumbleUpon. "In user acquisition, the big change we saw was that, as you buy super programmatic ads, what you end up buying is the ability to model exactly how many users you're going to obtain from those few banner ads." When presented with that data, she says, you need to get granular. You need to figure out not only what the users are going to do today but also how they're going to last as a lifetime value, and then compare that to their current cost of acquisition.

"Now we're seeing more people spending on these engaging branded experiences that not only get the eyeballs but also give something to the customer," says Gherini. Rather than going with the hard sell, they're providing something of value.

Whereas before marketers might have tried to push a marketing message on the user, now they offer an invitation to engage with the brand. Marketers want to create an experience that helps customers remember the brand and have a positive feeling about it. This proven approach helps create an engaging experience with all different types of users, who are then more likely to be loyal to the brand in the future.

*“Now we're seeing more people spending on these engaging branded experiences that not only get the eyeballs but also give something to the customer.”*

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*By figuring out exactly who these users are and customizing the experience for each and every user, we found an increase in engagement.*  
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Gherini thinks the biggest benefit she's gained from Individualized Marketing is increased consumer engagement.

“By figuring out exactly who these users are and customizing the experience for each and every user, we found an increase in engagement,” she says. “This is incredibly important. At the end of the day, if you acquire superficial users, they don't stick. They don't share. They're not viral. Their value is much more limited than users who are core fans and brand advocates.” Gherini notes that it takes

more work to run these types of programs, but the benefits remain and position you well for the future.

Consideration of the human element may mean an adjustment in strategy and require a greater investment of time and effort, but Gherini believes that it's a key step when making the transition to Individualized Marketing. By better understanding customers and what they want, you can create experiences that are both positive and memorable, leading to increased engagement and lasting brand loyalty.



*The most profitable brands don't compete on price; they are focused on speed, value, and availability to their customers. To be available, they have to be where their customers are. To provide a speedy response, they have to be listening. And to provide value, they've got to provide an individualized response. Without the tools and process to instantly respond and the data to make it personal, companies are leaving the business to those competitors that do.*



 |    
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## DOUGLAS KARR

Chief Executive Officer of DK New Media, and  
Founder of the Marketing Technology Blog,  
DK New Media



## SEIYA VOGT

Director of Demand Generation,  
Bitly

Seiya Vogt is currently the director of demand generation at Bitly where he oversees the entire marketing funnel. An internationally minded marketer, Vogt has experience working in the startup scenes of Tokyo, San Francisco, and his native New York. Through working at companies like Gengo, General Assembly, and now Bitly, Vogt has become an expert in acquisition, analytics, and inbound marketing.



Twitter | Website

Individualized Marketing is an essential strategy for Bitly, a link management platform for branding, analytics, and omnichannel marketing. “We have to be very individualized because incoming customers need to understand the outcome they’re going to get from their investment,” says Seiya Vogt, Bitly’s director of demand generation.

Customer narratives vary with the kinds of products they are interested in and the different kinds of business applications. Bitly uses an automated approach that analyzes leads and lead behavior, and based on that analysis, responds with individualized content and outreach.

To make this work, Vogt relies on three factors:

- **A deep understanding of the marketing funnel.** “When you think about the steps people are taking to sign up for your services, it’s very different depending on which product you’re marketing,” says Vogt.



*We have to be very individualized because incoming customers need to understand the outcome they're going to get from their investment.*



## KEY LESSONS

- 1 The free tier is essential because it generates many more opportunities to engage and collect individual data points.
- 2 It's helpful to use an automated approach that analyzes leads and lead behavior, and based on that analysis, respond with individualized content and outreach.

In Bitly's case, there are several ways someone can become a lead in the system. They might download a certain piece of content or sign up for a free account. "We might get 10,000 leads in a week, but as they move into the funnel, you can tailor the conversations in a much more individualized way," Vogt says.

- **Opt-in personal information.** Bitly crafts persona types based on the types of people who become leads in the system. This approach enables them to lead score early in the engagement process, based on factors that relate to the verticals their businesses are in, their interests, whether they are a decision maker, and other qualities. This information

shapes the kind of information shown to that person early in the engagement. This approach is also important for understanding the significance of the behavioral data Bitly captures while that person is on the site. "You can track that all the way down to someone becoming a customer and have a good idea of what the lifetime value of that customer will be," says Vogt.

- **Individualized site behavior data.** As soon as a site visitor becomes a lead, either through downloading a piece of content or creating an account, everything they did just prior to becoming a lead, and everything they do thereafter, is logged and analyzed.

*“You can track that all the way down to someone becoming a customer and have a good idea of what the lifetime value of that customer will be.”*

“

*It takes a mix of demographic and behavioral data to understand leads well enough to engage meaningfully with them as individuals.*

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This method enables Bitly to see whether the site visitor is just interested in a free e-book or if they are interested in particular products, how often they are visiting, and how they are using Bitly's services. "There's one major action a person takes to become a lead in the system, but it's what they do after that that enables you to understand them on an individual basis," Vogt says.

Vogt believes having the free tier is essential because it generates many more opportunities to engage and collect individual data points. If

someone downloads an e-book for the first time, you will see that person became a lead by downloading an e-book on a particular topic. You can then present an array of related information, and based on how they respond, you can frame a discussion based on what they've already shown interests them. In Bitly's case, leads come with highly divergent and unrelated interests. "It takes a mix of demographic and behavioral data to understand leads well enough to engage meaningfully with them as individuals," says Vogt.



*With so much information available and innovation happening, it's impossible to ignore the opportunity to provide as focused a marketing program as possible, right down to the individual. Buyers already are demanding it, even if they don't realize how feasible it could be. I believe vendors that work hard to provide this will be the ones that win the most business in the future.*



 |   
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# DEREK EDMOND

Managing Partner,  
KoMarketing Associates



## SCOTT MCALLISTER

Senior Vice President of  
Digital Marketing and  
Business Development,  
Time, Inc.

Scott McAllister is a digital marketing leader with more than 15 years of experience in the space. He has a passion for redefining marketing and how customers experience brands through the digital domain. His experience spans industries—computers and electronics, financial services, retail and media—and has depth in the big five areas of digital—marketing and media, experience building, data and analytics, mobile, and social.



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When making the transition to Individualized Marketing, advises Scott McAllister, it's important to set a high-level strategy that you balance with a focus on actionable steps.

"If you start at a very high level and go at it holistically without actually thinking about how you can make a pathway into an Individualized Marketing orientation, it's possible to bite off more than you can chew," he advises.

Along with defining your long-term vision, it's helpful to identify the stepping stones that will ultimately get you where you want to go.

McAllister believes that one path to successful Individualized Marketing lies in identifying individual consumers' passion points and speaking to them in a way that captures their interests.



*We achieved massive uplift relative to what we had seen historically on a standard offer for Entertainment Weekly.*



## KEY LESSONS

- 1 When transitioning to Individualized Marketing, businesses must understand and acknowledge that there is a significant learning curve.
- 2 Understanding your customers' passions and interests is crucial to driving engagement with individualized campaigns.

With the Time, Inc., media product, which is consumed in digital format as well as in a print magazine, McAllister's team can observe individual customers' behavior and reading habits. In doing so, they discovered that many Entertainment Weekly readers are deeply passionate about the hit TV show Game of Thrones. Around the time that season five was about to premiere, they ran a marketing campaign on their website focused on heavy consumers of content related to Game of Thrones. The campaign included imagery from the show and promotional offers for Game of Thrones t-shirts. As a result, he says, "We achieved massive uplift relative to what we had

seen historically on a standard offer for Entertainment Weekly."

Although big data is crucial to success with such initiatives, McAllister advises that, in many cases, success lies in marketer instincts paired with data. "The best opportunities are going to come from having a marketer that really understands their audience well. They might be able to perceive this data at a level that gets into some of the deeper insights." This method is how the Game of Thrones campaign was conceived, originating with insight from marketers who understood their audience and searched for the data that could help them to take advantage of the signals they had spotted.

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*The best opportunities are going to come from having a marketer that really understands their audience well.*

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Find a CRM you feel comfortable with that has successfully participated in your industry and has a team that supports you.  
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McAllister also advises marketers to find strong partners to help them make the most of their marketing technology investment. “There are several big packages out there that can be leveraged,” he says. “Find a customer relationship management [CRM solution] you feel comfortable with that has successfully participated in your industry and has a team that supports you. These are not small transitions. You’re talking about months and years here. This is not just a few weeks of a single project, so finding the right partner to work with is critical.”

Hiring is also an important factor to keep top of mind. McAllister feels that, to make an impact with Individualized Marketing, it’s wise to find marketers that are comfortable with Individualized Marketing as well as brand building. They should know how to segment customer bases, understand customers’ need sets, and present the right marketing

strategy that will elicit greater engagement with the marketing message. “I think that’s really critical,” he says. “If you have a Ferrari but you don’t know how to drive the Ferrari, you’re not going to get very far. For example, if you’re buying the right marketing CRM package but don’t have the right talent to run it, you really aren’t going to be successful.”

Organizations just beginning the process toward Individualized Marketing will serve themselves well by taking a realistic, bite-sized approach that acknowledges the scale of the learning curve involved. By hiring talented professionals that understand customer passions and can ask the right questions of the data, while selecting the right technology partners that can help them make the most of their tech investments, businesses can set themselves up well to achieve great results, McAllister believes.



*As consumers' interest in "noise" decreases and their need for individualized, meaningful experiences increases, brands will need to continue to expand on the creation of individualized interactions, data-driven storytelling, and an omnichannel approach to build strong, positive relationships with their customers. Amidst all the data, however, brands must be mindful of one key message: your customers are human beings—be sure to treat them that way.*



 |    
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## SUSAN BARONCINI-MOE

Chief Executive Officer, Chief Marketing Officer, Executive, and Leadership Coach,  
Business in Blue Jeans

# LEARN FROM THE SURPRISES



## ALEXANDRA TYLER

Senior VP, Head of Digital Marketing Global Test & Learn Acceleration, Consumer Marketing, Citi

Alexandra Tyler joined Citi in 2015 as senior vice president, head of Digital Marketing Global Test & Learn Acceleration, Consumer Marketing, Citi Global Consumer Bank. In this newly created role, she is building a new function focused on rapid global testing and learning to deliver business value across all Global Consumer Bank product lines. Tests that her team manages are targeted to create client-centric marketing capabilities to drive a shift from mass marketing to massively Individualized Marketing.



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Alexandra Tyler is the head of Digital Marketing Global Test & Learn Acceleration, Consumer Marketing at Citi. She's spent her career moving toward Individualized Marketing.

"Here at Citi," she says, "we strive to walk in the shoes of our customers every day."

As a digital marketer, walking in the customer's shoes requires being something of a marketing chameleon, says Tyler. To accomplish that, Tyler recommends taking a three-pronged approach to creating an Individualized Marketing program: set the right goals, spend time on discovery, and leverage your partners' experience.

Tyler suggests starting an Individualized Marketing program by setting goals that outline measurable business objectives that help you to reach truly Individualized Marketing.



*We strive to walk in the shoes of our customers every day.*



## KEY LESSONS

- 1 Individualized Marketing must start with a clear understanding of what you hope to achieve for your marketing efforts.
- 2 A data management platform provider can be one of your greatest allies in achieving Individualized Marketing.

# LEARN FROM THE SURPRISES

“Be very clear with setting those goals and make sure they are measurable,” she says. “Further, it’s crucial that they are communicated with senior management, marketing teams and across functions so everyone understands what problems they are solving for.”

Ideally, what you should be striving for is the ability to create an individualized, one-on-one relationship with your customers. Everyone in the organization must be working toward that same goal, and organizational executives must understand what reaching that ultimate goal requires in terms of funding, resources and organizational alignment.

Tyler’s second bit of advice is to spend a fair, but accelerated amount of time on discovery.

For example, Tyler says that the goal might be to guide customers to specific financial products based on their current lifestage needs or certain triggers like buying a house. To do that, the organization needs to understand what marketing channels customers are leveraging to learn about the company and then combine that knowledge with individualized data, if available.

“You have to start with the big picture and use data and analytics you already have available to ascertain what characteristics are relevant to your Individualized Marketing strategy.”

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You have to start with the big picture and use data and analytics you already have available to ascertain what characteristics are relevant to your Individualized Marketing strategy.”

# LEARN FROM THE SURPRISES

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Often, a lot of time is spent trying to vary marketing strategy based on characteristics that may not actually influence performance.  
”

Looking at and analyzing that data could make it easier to achieve the goal of Individualized Marketing.

Tyler points out, “Often, a lot of time is spent trying to vary marketing strategy based on characteristics that may not actually influence performance. Analyzed data gives you a good picture of what actually drives potential variances in performance and how you might leverage those variances.”

Tyler noted the third prong in an individualized strategy is to leverage the knowledge and expertise of data management platform providers, if companies are using one. They can be one of your greatest allies in achieving Individualized Marketing.

“You want to meet with them and leverage their institutional knowledge. They have probably spent a lion’s share of time focused on the exact questions around how to create more Individualized Marketing.”

They’ve seen what works best, Tyler explains and “they’re motivated to enable your success and link with theirs, so take advantage of the experience they might have that you might not.”



*The toughest part is making a holistic commitment to “customer first,” in all aspects of marketing and communications. The good news is that today we have lots of data, but it is also the bad news, as it can be overwhelming to make that data actionable and used in a way that makes sense for the customer. To jump-start customization, one of the techniques we have found is to start the customer-centric approach in the offline world (I realize this approach is counterintuitive) or start with a specific set of customers or business units to master an integrated customer experience (online and offline). This way, you can build your data sets, technology, and processes in an integrated, repeatable way and roll them out across your organization and customer segments.*



 |   
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SCOTT VAUGHAN

Chief Marketing Officer,  
INTEGRATE



## MATTIAS MACDOWELL

Data Scientist,  
Cisco Systems

Mattias MacDowell is a 13-year digital marketing veteran, serial entrepreneur, and data scientist. Currently, he is focused on driving increased engagements through microtargeted marketing programs for Cisco Systems. Previously, MacDowell founded and exited several businesses including a medical device company as well as an online retail store. He thrives on challenging the status quo while remaining true to proven marketing principles. MacDowell lives in Wilmington, North Carolina, with his wife and three children.



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Marketers think of Individualized Marketing as crafting individual communications and interactions with customers based on data that is unique to them, and in this way, increasing the business value of those individual customer relationships. That is Individualized Marketing. However, it can take very different forms in different kinds of businesses.

Individualized Marketing is playing an increasingly important role in business-to-business engagement. A good example is a program Mattias MacDowell runs in his marketing work for Cisco.

Cisco is a widely recognized technology brand that sells enterprise-grade technology solutions. The decision cycle for purchasing these kinds of solutions is typically long, and it involves a number of decision makers and influencers. Effective marketing in this environment requires a long-term, influential strategy. An Individualized Marketing approach must touch everyone involved with relevant, timely, individualized communications that recognize their different roles in the decision process.



*People in the HR department will receive different communications from those in the executive suite, and all the messages will be individualized based on what we know of their interests.*



## KEY LESSONS

- 1 Individualized Marketing communications have a much greater response rate compared with generic communications from the company.
- 2 To successfully implement this approach, you must continuously collect data and update the lead file with more individual attributes.

This approach can be tricky, especially in a large enterprise environment where, at any given time, multiple overlapping, multichannel marketing programs exist. Coordinating all those marketing communications is not realistic because not all of the marketing efforts have the same goals.

MacDowell's program is specifically designed to develop individual relationships on behalf of field sales representatives. He does this through a real-time individualized communication strategy that feeds relevant event-related information to leads. The events can be demos, training opportunities, or conferences happening within 75 miles of the lead, webinars, downloadable white papers and reports—anything that has gated access.

A key part of this approach is mapping all events every month to every lead, tying the events by job function, company vertical, job level, whether an event is local to that person, and topical interest scoring based on a person's website activity.

"All this data ties to an email program that comes from the sales representative associated with that lead's account," says MacDowell.

Every communication targeting a particular individual comes from a field sales representative who would be known to that lead. And the contents of the communications are based on data provided by the individual, including the prospect's real-time Web activity such as the events and content assets they view.

*“When someone receives a message from someone they know, and it contains something relevant, timely, and useful, then we have a significantly increased engagement.”*

“

*When we started designing messages based on interest scoring, we saw a drastic increase in engagement with email, and that was a nice surprise.* ”

In this way, MacDowell can reach different influencers at a particular company with communications containing information of interest to them, coming from people they know.

“If it’s a human resources [HR] solution, people in the HR department will receive different communications from those in the executive suite, and all the messages will be individualized based on what we know of their interests,” MacDowell explains. This Individualized Marketing strategy has proven to be hugely successful. Individualized communications have a much greater response rate compared with generic communications from the company.

“When someone receives a message from someone they know, and it contains something relevant, timely, and useful, then we have a significantly increased

engagement,” says MacDowell. The biggest gains came when they began combining interest scoring data based on website activity monitoring, with opt-in information the leads provided themselves at various gated events. “When we started designing messages based on interest scoring, we saw a drastic increase in engagement with email, and that was a nice surprise,” says MacDowell.

To successfully implement this approach, you must continuously collect data and update the lead file. Data can come from your interactions with individuals as well as data from third-party sources that is relevant to those individual leads.

“You must keep attending to this customer file, keep adding more and more attributes, and track what they are doing at the website,” says MacDowell.



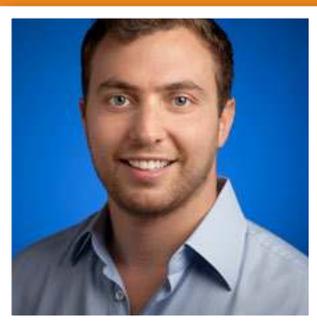
*Today, competition is all about data. It's about having more data, cleaner data, and better performing data than the competition. Those companies that can harness data and drive data science in their organizations will come out the winners. Today's mandate is to drive deep into the data to determine the corrective and systemic actions to take with customers.*



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# WILLIAM MCKNIGHT

President,  
McKnight Consulting Group



**LEO  
SEI**

Product Manager,  
Google

Leo Sei is a product manager on the Google AdWords team. In this role, he focuses on AdWords power user tools, such as bulk changes (from automated rules to AdWords scripts), upgraded URLs, and business data management. Sei has a master of science degree in computer science from Imperial College in London and a master of science degree in network security from Telecom ParisTech.

   
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A successful approach to Individualized Marketing, according to Leo Sei, involves tailoring your ad to each individual at the moment when they're looking for your product. Taking context into account is particularly important. When a person is searching for something, that search is taking place within a certain environment.

"So whether it's on mobile, on the go, outside, or inside, the more information you can gather about this environment around them, the better you can make your advertising pop out of the mix," he says.

Sei remembers one impressive example in which a hotel chain used flight cancellation data to better focus their advertising. "They realized that when there were a lot of flights being canceled at a given airport, a lot of people started searching for a hotel online," he says.



*The more information you can gather about this environment around them, the better you can make your advertising pop out of the mix.*



## KEY LESSONS

- 1 Technology cannot be ignored when creating Individualized Marketing. Your ecosystem should be agile and flexible.
- 2 The faster you can learn what works and what doesn't, the faster you can improve your Individualized Marketing efforts.

“As soon as some of the airports had a higher than average cancellation rate, they would increase their bidding into the airport region. That would make them really relevant.” A traveler, stranded at the airport because of a delayed flight, would then find an ad individualized to their actual situation, such as a hotel room available in San Francisco, and would then be more likely to act on the offer as a result.

Sei also notices that some of his clients are beginning to use audience data or first-party data in their campaigns. “Not all of them are doing it, though,”

he adds, noting that it looks like there is still a silo between marketing data and customer data in many cases. “I think advertisers could benefit a lot from joining those data because they have an immense amount of data on their customers,” he offers. “The key to Individualized Marketing is making sure you’re sharing everything you know about your customer through the marketing funnel so that when you touch that customer again, whether it be via the Web, email, or social, you actually can embed the data you know about them into that advertising.”

“  
*They realized that when there were a lot of flights being canceled at a given airport, a lot of people started searching for a hotel online.*  
”

“Mentioning that you know who they are makes the ad incredibly more tailored. The impact on engagement you'll get on those advertisements is really key.”

There are many ways in which marketers can use first-party data to better individualize their messaging. Airlines that have data on their top-tier frequent fliers, for example, can make sure that whenever those customers see advertising from the company, their status as top-tier fliers is recognized. “Mentioning that you know who they are makes the ad incredibly more tailored. The impact on engagement you'll get on those advertisements is really key,” Sei advises.

In sum, businesses looking to make the transition to Individualized Marketing can begin doing so in multiple ways. By understanding the

external factors that might influence the mood or the behavior of their customers at the moment customers are searching for specific products or services, companies can increase their relevancy with well-timed ads and offers. By examining the data they already have in-house and considering how it can be used to better individualize their marketing, then trying to implement those customizations at scale with programmatic methods, companies can also better refine and individualize their messaging. In pursuing those strategies, they can increase engagement and generate greater sales opportunities for the company.



*Individualized Marketing is pointless without knowing the individual. Understand the dreams, hopes, and fears that motivate your customers, then hit them where it counts.*



 |   
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PAUL GILLIN

Social Media Trainer and Consultant,  
Profitecture

# IF YOU'RE IRRELEVANT, YOU'RE DONE



**BILL  
KISS**

Former Chief  
Marketing Officer,  
Sears Holdings

Bill Kiss, in his most recent role as CMO for Sears Holdings, oversaw the marketing strategy and corresponding spend of print, broadcast, and digital; lead all digital and online strategy; and worked towards evolving the marketing model to support the company's integrated (omnichannel) retail business model. Under his leadership, Sears and Kmart made significant strides in improving their marketing spend, shifting the marketing focus from almost exclusively mass to a greater balance of customized and digital customer engagement.

Sears has made major strides toward Individualized Marketing, according to Bill Kiss, former chief marketing officer for the retail giant. "Sears has been committed to this approach a long time now," he says. "As such, the technological advancements and the data that we have painstakingly built are very robust."

Nonetheless, for Sears as for nearly everyone, there is a long way to go to realize the full value of Individualized Marketing. Based on Sears' progress and success so far, Kiss offers a few bits of advice to fellow marketers setting out to begin implementing Individualized Marketing:

- **Gather mountains of data.** "Make it a stated commitment across your touchpoints, no matter what industry you are in, to gather all of the information you can," Kiss advises. Once gathered, he says, data needs to be warehoused at an individualized level. In today's interconnected world where everyone uses multiple devices, segmentation even at just the household level could lead to failure.



*Make it a stated commitment across your touchpoints, no matter what industry you are in, to gather all of the information you can.*



## KEY LESSONS

- 1 Gather mountains of data; cleanse and refresh it religiously.
- 2 By augmenting consumer data with outside data resources, businesses might find themselves becoming much more efficient at marketing operations.

# IF YOU'RE IRRELEVANT, YOU'RE DONE

Imagine a woman is shopping for pajamas on your website using her tablet. To her annoyance, she gets a pop-up ad for power drills generated because her husband used his laptop inside their home earlier to shop for power tools. "If you warehouse under the same preferences all the items that we as a family are browsing and buying" Kiss warns, "you're going to lose me."

- **Cleanse and address data hygiene data religiously.**

Constantly purge bad data and replace it with good data. Kiss uses another example—that guy who was surfing the Sears.com website looking for a battery-powered Craftsman drill. Suppose he chooses not to buy it, Kiss says. "Guess

what he is going to get in his refocusing email?" Kiss asks "Or if he signs back into the site and the page, what do you think I am going to curate for him? Drills!"

However, if through data hygiene, you discover the guy no longer is interested in drills, Kiss adds, throw out that data and swap out that bit of messaging. A retailer in particular could lose credibility if it repeatedly pitched a product offer after a customer already purchased the item. That would suggest that the company does not really know him, or his preferences, Kiss explains. "Increasingly marketers and business people need to do this," Kiss offers.

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*If you want to keep or grow a customer base, you have no choice.*  
”

# IF YOU'RE IRRELEVANT, YOU'RE DONE

But here is a problem: How would you know if a customer was looking at a product on your website, but has purchased the product elsewhere? Legally, businesses are not permitted to collect direct information on competitor sales, Kiss notes. However, it is becoming possible to glean intelligence that is nearly that good. Vendors now exist that contract with banks to gather semi-anonymized consumer purchase data—minus point-of-purchase and other identifiable information—and offer it to marketers.

To explain the implications, Kiss describes yet another scenario. Say a customer is commuting by train and opens the Sears smartphone app. He shops for a necklace as a Mother's Day gift but does not find one he likes. At lunchtime, he picks up the search again, this time from his work desktop. He still does not find what he wants, but now Sears knows he is interested. After work, he finally scores the right necklace—at a Macy's department store down the street from his office. He bought it from a competitor!

Obviously, that would not be a win for Sears. However, there is an upside. Augmenting its customer data with credit card purchase data obtained through a third-party source could trigger Sears to stop pushing that item to the customer and redirect its efforts. "You didn't wastefully spend," Kiss contends. "You didn't tick off and barrage the customer with unnecessary stimulus." It shows how Individualized Marketing might make marketing operations more efficient in the future, Kiss suggests.

Kiss believes Sears is at the forefront of the Individualized Marketing movement. Individualized Marketing is becoming an expectation, he says, particularly among Millennials. Soon, anything short of that will make a business seem irrelevant. If that happens, you're done, Kiss warns. "So if you want to keep or grow a customer base," he concludes, "you have no choice."



*Media is moving from mass to individual through Twitter, Instagram, Snapchat, and YouTube. As a company, your marketing needs to make the same transition, and you can only do this with systems that allow you to understand each of your customers individually, yet at scale.*

*People don't care about what your company wants to sell. They do care about things that are highly relevant to them as an individual.*



 |   
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# MIKE VOLPE

Board of Directors,  
Repsly, Inc.

# YOU CAN'T IGNORE TECHNOLOGY IN INDIVIDUALIZED MARKETING



**ERIC  
BERKMAN**

Director, Digital Marketing,  
Genworth Financial

Eric Berkman is an Individualized Marketing and technology professional in charge of Genworth's digital lead generation efforts for long-term care insurance. He builds revenue and lead-generating campaigns and optimizes for conversion by integrating marketing channels, creative, data, and technology. He runs paid search, SEO, social, and display marketing while managing ROI. Berkman is committed to constantly learning and has a history of developing marketing programs from scratch and turning around underperformers. He has prior experience in e-commerce at both Circuit City and Healthy Directions.



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Eric Berkman refers to himself as a Marketing Technologist. He considers technology to be core to moving to Individualized Marketing.

He says, "The biggest piece of advice I have is think about your ecosystem for the campaigns you're going to use, including data integration and technology platforms. You should design your ecosystem so that it's agile and flexible, and can easily enable your ideas to be tested."

To achieve true Individualized Marketing, many different campaigns, data sources, and platforms need to come together. Berkman warns that if you don't integrate those technologies in a thoughtful way, creating Individualized Marketing will be time-consuming, resource-intensive, and may lead to poor results.

"It's important to be thoughtful in how you plan it out," he says.



*Think about your ecosystem for the campaigns you're going to use, including data integration and technology platforms.*



## KEY LESSONS

- 1 Technology cannot be ignored when creating Individualized Marketing. Your ecosystem should be agile and flexible.
- 2 The faster you can learn what works and what doesn't, the faster you can improve your Individualized Marketing efforts.

# YOU CAN'T IGNORE TECHNOLOGY IN INDIVIDUALIZED MARKETING

"Set yourself up for success by being able to switch in and out if you need to make a change to a technology platform. As you try to create this multi-touch, one-to-one type of marketing, it gets more complicated. Setting up your ecosystem, platforms, and infrastructure so that you can swap in and out to give yourself the best chance at success is key."

Investing in the time and effort necessary to create a technological system that supports Individualized Marketing is not without benefit, both to the organization and its customers.

"One of the biggest benefits is you actually get better feedback from your customers because the use of Individualized Marketing enables marketers to show that they actually care about their customers," he says. "It enables you to deliver more relevant messages. That translates into getting good feedback from customers all the way down to the sale and eventually getting feedback from the salespeople who sell the product. Customers get the information that they need when they need it, and the marketing enables them to be better educated by the time they actually go to the salesperson."

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*The use of Individualized Marketing enables marketers to show that they actually care about their customers.*

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That translates into  
getting good feedback  
from customers all the  
way down to the sale.  
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You might need to try multiple approaches before you find the right marketing mix to provide the *marketing gold* for which you're searching.

“I think speed to learning is so important,” says Berkman. “I think about this a lot because most marketing will fail, but when we hit that homerun it makes up for some of the attempts that don't succeed. So, the more quickly you learn, the more quickly you can figure out what works and what doesn't.”

Finally, Berkman says the last piece of the Individualized Marketing puzzle is attribution.

“To build an Individualized Marketing program, you have to pull in various campaigns and create omnichannel methods to connect with the customer,” he says. “If you're going to create Individualized Marketing, you need multichannel campaigns, personas developed, and a lot of different data sources. You also need an attribution system to understand the value of each of your click trails. If you don't, then you're not going to be able to create efficiency in terms of where and how you're spending your money.”



*As time spent online and in social media only continues to increase, so does the amount and variety of data that can be tied back to the actions of specific individuals. Those companies that can leverage this data at every stage of the customer journey will not only succeed in their individual marketing efforts but also provide a superior customer experience that will leave the competition far behind. In doing so, the relationship with the customer is only deepened, and when supplemented with brand advocacy efforts in social media, will lead to a strong online community with a plethora of real social business benefits.*



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# NEAL SCHAFFER

Social Media Keynote Speaker,  
Maximize Your Social

# OCBC: INDIVIDUALIZED MARKETING IN ITS INFANCY



**CEDRIC  
DIAS**

Head of Digital Marketing –  
Consumer Financial Services,  
OCBC Bank, Singapore

Cedric Dias is currently head of digital marketing for OCBC Consumer Bank in Singapore. Most recently, he led the digital business in Singapore for Havas Media and headed the Socialyse brand in Asia Pacific responsible for key accounts, new business, and team development. Dias is a specialist in brand strategy and marketing and digital marketing with a focus on market leadership.



Twitter

Individualized Marketing is important for the growth prospects of financial institutions, and in his role as head of digital marketing for consumer financial services at OCBC Bank, Cedric Dias is part of this initiative. Individualized Marketing is in its infancy at OCBC, Dias acknowledges. Most bank's marketing efforts still mainly rely on demographics and relatively mass messaging.

However, that is changing as companies move toward individualization—driven by the simple insight that customers' individual needs are unique. "Knowledge of customers becomes critical to making marketing more and more individualized," Dias observes. "So getting as much data of customers is critical to the success of such initiatives."



*Knowledge of customers becomes critical to making marketing more and more individualized.*



## KEY LESSONS

- 1 OCBC's move into Individualized Marketing is driven by the insight that all customers' needs are unique.
- 2 Customers are willing to share their data, provided that the business offers them genuine value in return.

# OCBC: INDIVIDUALIZED MARKETING IN ITS INFANCY

That process could involve populating as many as 100 fields of customer data—including demographics, psychographic traits, tracked website visits, call center contact information, and in-person interactions at bank branches, along with other data points. OCBC has invested heavily in technologies to help it harvest and make use of individualized customer data. “It is a system-driven program,” Dias observes. “Data collection is already underway.”

The personalized marketing program, dubbed the Next Best Action pilot project, will roll out once a critical mass of data is compiled. Through the project, the bank could upsell consumer financial services—travel insurance, home loans, and wealth-management

products—to existing banking customers. In the process, it will track customers’ individual behaviors and mark their life milestones. So, for example, if the bank determines through purchase histories or direct contact, that a customer has a new baby, it might email her information about college savings. If another customer turns 40, the bank might send him hints on retirement savings.

The pilot tackles segmentation somewhat cautiously, Dias admits. He considers the effort required for data collection versus the returns to make it worthwhile. Dias asserts, “The returns per customer should justify making the effort.”

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If we just talk to the person about what we already know about them, we could send them the same message throughout the year, over and over.”

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*That is the first consideration—getting enough information to be able to provide that value for that individual.*  
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Obviously, these Individualized Marketing efforts are new and will almost certainly grow beyond the limited scope. But already good lessons have been learned. For instance, Dias says that demographic data alone is not nearly enough to support an Individualized Marketing effort. “If we just talk to the person about what we already know about them, we could send them the same message throughout the year, over and over,” Dias comments. That would not contribute to a positive customer experience, which is the only thing that makes it worthwhile for consumers to share their data with businesses, he says.

Dias has simple advice for marketers taking on this approach: Know your customer. Your biggest challenge in meeting that objective will be to collect a critical mass of individuals' data, he says. But for that, he warns, there is no alternative. “It is only then that you can be as individualized as it gets.”

The good news is that many customers willingly offer up their information—provided they receive value in return. “That is the first consideration—getting enough information to be able to provide that value for that individual,” he states. “We have not yet hit on the magic wand to get that solution. We are trying various things to get there.”



*Call it what you want—Individualized Marketing, personalized marketing, omnichannel marketing—it needs to be governed by unified marketing logic. Marketers have too many systems governed by their own logic today, which is the primary culprit for the brand and customer disconnect. Data integration and management aside, unless we figure out how to communicate and engage with customers in a coherent and connected way, we will be back where we started when we talked about one-to-one marketing years ago. Chief marketing officers need to reclaim their role as unified marketing logic generals and stop firing from multiple systems as if systems were the starting or end point with our customers.*



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LORA KRATCHOUNOVA

Instructor,  
Brandeis Graduate Professional Studies



*Prospects and customers are getting technologically savvy by the day and no longer tolerate disruptive marketing practices. Today's marketers need to be data-driven and agile to embrace and keep up with the ongoing changes in both technology and industry trends. Most important, they need to have a healthy balance of both intelligence quotient and emotional quotient to be able to humanize marketing experiences, while tying directly to company goals and being able to quantify their efforts to the C suite.*



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## ANNA BARCELOS

Director of Marketing,  
Vector Software, Inc.



*Over the past five years, we've built systems that follow our specific directions. In the next five years, we'll need to release control to a new breed of systems that make marketing decisions on our behalf, person by person, moment by moment. Will you be ready to let go?*



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## ERIC WITTLAKE

B2B Digital Marketer, Media Director, Strategist, and Industry Blogger

# INDIVIDUALIZED MARKETING IS BOTH SIMPLE AND HARD



**JEFF  
MARCoux**

Board Member and NW Chair,  
Internet Marketing Association

Jeff Marcoux is a board member of the Internet Marketing Association. He has driven cross-product and team collaboration, supported multiple product releases, brought new products to market, created innovative content strategies, and performed channel development and acquisition integration work. He believes every touchpoint with a customer is a marketing experience—from marketing to sales to customer service. Jeff is a marketing growth hacker and technology expert who brings entrepreneurial innovation to a big tech world.



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Microsoft has begun its move toward Individualized Marketing as a strategic imperative, says Jeff Marcoux, the company's CMO Lead, Worldwide Enterprise Marketing.

"It's about building those relationships with your customers," Marcoux asserts. "Those personalized relationships are what will take them from a prospect to a customer, from a customer to a fan, and from a fan to a raving fan."

Individualization is an elegantly simple idea—and, in some ways, it can even be easy to execute. If you have a designer on staff, for instance, it's not difficult to tailor social messages aimed directly at audience influencers. "The wow factor that has driven in social engagement alone is huge," Marcoux offers.

In other ways, though, Individualized Marketing can be hard. A challenge that many companies need to tackle is pulling together massive, siloed data repositories of customer information, Marcoux explains.



*Those personalized relationships are what will take them from a prospect to a customer, from a customer to a fan, and from a fan to a raving fan.*

## KEY LESSONS

- 1 Getting into Individualized Marketing can be relatively easy—consider sending out tailored social messaging to audience influencers.
- 2 Take stock of the systems you have in place that can be used for Individualized Marketing, and determine which key tools are still missing.



# INDIVIDUALIZED MARKETING IS BOTH SIMPLE AND HARD

In the past, systems and databases were often built as needed, by and for individual business divisions. Normalizing and optimizing those data sets is an important part of getting set up to do Individualized Marketing.

“You have business groups and teams that have been running their own businesses forever,” Marcoux says. “Each has been running its own databases. The challenge is how do you bring that all together to get to an individualized level?”

Microsoft is working on Individualized Marketing solutions that can interact

directly with users. For example, working with Microsoft, one of their partners VMob built a mobile, Individualized Marketing platform for McDonald’s Swedish, and Dutch markets.

The system constantly pulls data from the users’ mobile app and also from various McDonald’s consumer touchpoints—point-of-service terminals, in-store Wi-Fi, and in-store sensors—that track customers’ in-store visits and log their purchase patterns.

“It basically learns about you over time. The more you use the app, the better your experience is,” Marcoux says.

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*It means I am not a number. I am not a segment. I am me. I am an individual to your company.*  
”

# INDIVIDUALIZED MARKETING IS BOTH SIMPLE AND HARD

The platform then generates customized deals and sends them when they are likely to be most effective, Marcoux says. If a customer habitually stops at McDonald's for coffee on Tuesdays and routinely stops for ice cream on weekends, the platform learns those behaviors and responds accordingly. The program has worked well. Marcoux says McDonald's has seen average [spend increase by 47%](#) because of up sales.

Asked to advise his fellow marketers on easing their transition into Individualized Marketing, Marcoux suggests that these three questions should be asked and answered:

- Which touchpoints matter most to your customers?
- What systems do you already have in place that could easily be used in Individualized Marketing efforts?
- What types of data and systems do you still need to put in place to begin or further your move to Individualized Marketing?

To be successful, Marcoux believes that companies must begin developing tight bonds with individual customers, influencers, and advocates, maintaining those relationships by offering people positive value and gratifying experiences.

"That is where I see Individualized Marketing playing such a huge part," Marcoux concludes. "It means I am not a number. I am not a segment. I am me. I am an individual to your company. It is not about technology, it is about personal relevance and making your brand just that little bit more special."



*Customers want to feel loved. Companies that integrate Individualized Marketing within their communications strategy will catch the customers' attention and, above all, create an emotional connection that delivers brand loyalty, word of mouth, and more sales.*



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# NIGEL TEMPLE

Founder,  
The Marketing Compass



## JULIAN HILLEBRAND

Product Manager,  
Convidera GmbH

Julian Hillebrand works as a product manager at Convidera, an innovative consultancy and enterprise software company based in Germany. He is well versed in how new technologies affect business strategies and how companies have to integrate data in their daily activities. He created the digital business blog [thinktostart.com](#) and is the author of the book *Mastering RStudio*, showing people how to use one of the most popular tools for data analysis.



Twitter



Website



Blog

“Individualized Marketing is not about sales,” says Julian Hillebrand. “It’s about building a relationship with the customer.” To do so successfully, companies must become customer-centric, not only in the way they do marketing and sales but also in the way they operate across the enterprise. This reality is true because the main driver for Individualized Marketing is data, and that comes from many different operations within the business.

Hillebrand describes three essential aspects of a successful Individualized Marketing strategy, all of which are highly dependent on data. The first is identifying and collecting the data itself. “Many companies do not take full advantage of the data they own,” says Hillebrand. They know they have a valuable resource in their data, but they don’t know how to use it.

“There are three kinds of data in the company: customer-specific data, operational data, and financial data,” he says. “Individualized Marketing needs all this data.”



*Individualized Marketing is not about sales. It's about building a relationship with the customer.*



## KEY LESSONS

- 1 It is important to build company operations and engagement strategy around aggregated data, because customers will engage in unpredictable ways.
- 2 A successful Individualized Marketing strategy goes way beyond affecting just marketing and sales.

The customer-specific data can include information individuals provide, individual emails, interactions with the service department, data collected by tracking their behavior at digital touchpoints, and even social media. Operational data includes data about business processes, such as manufacturing, distribution, and supply chain operations, that are the basis for product and service delivery. Financial data are revenues and costs associated with operations that enable product and service delivery. "Companies need to aggregate all this data so that they can understand what the customer

wants as well as the business implications of those preferences," says Hillebrand.

The second key ingredient of Individualized Marketing is having the tools to derive meaning from all that data. Hillebrand says, "Companies need to fully understand their data. It's not about classic key performance indicators, like they did before. They have to see the deeper business insights that data holds." These insights include understanding what a customer wants and knowing in near-real time the operational requirements and financial implications of fulfilling that desire.

*“There are three kinds of data in the company: customer-specific data, operational data, and financial data. Individualized Marketing needs all this data.”*

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*Companies need to aggregate all this data so they can understand what the customer wants as well as the business implications of those preferences.*  
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The third element of Individualized Marketing is the company as a whole must be highly integrated in their customer-centric operations. “Now that the customer is totally measurable, it becomes possible to align the customer-centric business strategy from the top down,” says Hillebrand. In the past, companies have had the advantage of knowing their basic customer path. But in times of omnichannel engagement and social data, the traditional customer path breaks down. It is important to build company operations and engagement strategy around aggregated data because customers will engage in unpredictable ways. Also, the customer is in much greater control of their engagement than in the past.

A successful Individualized Marketing strategy goes way beyond affecting just marketing and sales. Individualized Marketing

brings traditionally disconnected operations across the enterprise much closer to the customer, which makes the company more responsive to customers at an individual level. This ability affects other aspects of the operation, from managing production runs and distribution channels to more effective predictive capabilities around business cycles, and even influencing product design in ways that strengthen a competitive position in the market.

“With Individualized Marketing, companies tap data that affects operations within the enterprise that run much deeper than just marketing and sales,” says Hillebrand. In some cases, this process might take longer for an initial sale to happen, but companies are investing in more sustainable relationships with their customers.



*Old school has to meet new school. Learn the truth about your customers with qualitative and validate with quantitative. If you only look at usage data, you'll only know how people use today's offering. If you only look at survey data, results will be biased by questions. Start with qualitative contact—phone, in person, calls—about customers' daily life, pain, and dreams ... and build your skills in the follow-up questions that uncover jewels. You'll be shocked by what you learn in just 5 or 10 non-sales conversations. Then use survey, usage patterns, and other quantitative data to validate what you learn. You'll find planning and execution are wildly easier when you know what matters.*



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**KEN ROSEN**

Managing Partner,  
Performance Works Consulting

# INDIVIDUALIZED MARKETING BUILDS THE BRIDGE TO THE CONSUMER



## FIONA PIETRUSKI

Chief Marketing Officer,  
Shopography

Fiona Pietruski is a consumer and influencer marketing expert with more than 15 years of experience. She was senior vice president of member strategy and growth marketing at Crowdtap, one of the top-five fastest-growing marketing companies in the Inc. 500 two years in a row. Before that she was a founding member and CMO of the Shespeaks.com social activation platform; CMO for Cravebox, a VC-backed B2C service; and spent 8 years at HSBC Global E-business in leadership roles.



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Website



Blog

As a self-described “middle-aged mom,” Fiona Pietruski often finds online shopping sites frustrating. “They are showing me pictures of twenty-somethings in summer clothes,” she says. “That is absolutely irrelevant for me.”

Her experience, she believes, is symptomatic of the huge mismatch between the amount of data that businesses collect from customers and the quality of service that customers get in return. Her company, Shopography, aims to alter that equation. “The aim for me is to harness a lot of that available data, which consumers have already handed over willingly—then turn that into smart machine learning and artificial intelligence,” says Pietruski, Shopography’s chief marketing officer.

Shopography has as its centerpiece a powerful mobile app that allows customers to find and share product purchase ideas and discuss trends. Customers can take the app into partner stores, scan Universal Product Codes with their smartphones, and share them with friends who then can view the product with their own app. “You can say, ‘Hey, I found this and I thought you might like it.’ Or, ‘Do you think this goes with these shoes?’” Pietruski says.



*The aim for me is to harness a lot of that available data, which consumers have already handed over willingly.*



## KEY LESSONS

- 1 There is a huge mismatch between the amount of data that businesses collect from customers and the quality of service they get in return.
- 2 Individualized Marketing can build the missing bridge between consumers and retailers.

# INDIVIDUALIZED MARKETING BUILDS THE BRIDGE TO THE CONSUMER

App users can curate their preferences using hashtags, or be inspired by the profiles of trusted influencers—who can be messaged directly through the app, Pietruski points out. Naturally, Shopography collects data on all that activity, building up unique data sets for direct Individualized Marketing purposes. And the company is not just sitting on that data, Pietruski notes. “We can reach out to the customer and say, ‘Oh! We see that you just bought yoga pants and a yoga mat,’” Pietruski notes. “Here are some suggestions in that product set.”

Individualized Marketing, of course, has not fully matured, nor has Shopography. To reach full potential, much more data must

be collected, Pietruski notes. Once it reaches critical mass, an existing technology—geo-sensing and in-store beacon technology—can kick into gear. At that point, Shopography will be able to make instantaneous recommendations and offer discounts, one-to-one in real time, while the individual customer is in position and ready to buy. “In practical terms, that is a little down the road for us, but beaconing is definitely where we are headed,” Pietruski comments. “Beaconing would enable us to triangulate all that consumer information into one big picture.” Consumers would have to opt in, but she is confident they will. “Our research tells us that consumers are very open to this,” she says.

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What we are trying  
to do is satisfy the  
consumer's need on the  
full path to purchase.  
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*Be laser-focused on satisfying consumers. Unlock a better experience for them, using the data, tools, and technologies that you have available.*

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To Pietruski, Individualized Marketing is the missing bridge between consumers and retailers. “I think what we are trying to do is satisfy the consumer’s need on the full path to purchase,” she offers. “It’s knowing who I am, knowing where I am—maybe even my life stage.”

She offers a gentle reminder not to confuse priorities. Technology is the means to that desired end, she says, not the end in itself.

“It can actually be a distraction from the thing that is going to make you successful,” Pietruski concludes.

Her advice to fellow marketers hoping to tap into Individualized Marketing is basic. “You need to be laser-focused on satisfying consumers,” she advises.

“Unlock a better experience for them, using the data, tools, and technologies that you have available.”



*To avoid the creepy factor, marketers need to think like a concierge, anticipating our customers' needs and preparing the helpful information that guides them to the destination of their choosing. Marketers that succeed in this role aren't just layering automation onto the status quo. Instead, they start with deep insight into their customers' expectations and criteria for choosing solutions like theirs.*



 |   
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## ADELE REVELLA

Chief Executive Officer and Founder,  
Buyer Persona Institute



## ALAN OSETEK

Global President,  
Resolution Media, an  
Omnicom Media Group company

Alan Osetek is the global president of Resolution Media and oversees the global growth of Omnicom Media Group's search, social, and digital performance media unit. Prior to joining Resolution, he served as managing director for iProspect and was responsible for the company's East Coast operations. Before joining iProspect in 2008, he served as a board member and CRO for Visual IQ. Osetek holds a bachelor's degree in economics from Skidmore College and an MBA from Babson College.



Twitter



Website



Blog

When making the transition to Individualized Marketing, Alan Osetek believes you must first take a holistic look at your customers and determine how best to reach them across the many channels that have proliferated in recent years. In most Fortune 500 or Fortune 1000 marketing departments, for example, newly emerging channels have helped brands reach valued consumers but have unfortunately created more departments, silos, and specializations which make it even more difficult to coordinate across channels to maximize results.

Osetek offers search as an example of how this phenomenon has developed. Search ads now can be highly customized, and ads can be targeted to individual customers or segments, with copy addressing their specific situations by offering customized prices, offers, or communications.

But while the concept of Individualized Marketing seems straight forward on the surface, there's a great deal of nuance that requires a significant shift in the way organizations think about and plan their marketing campaigns. First, for organizations considering the transition from mass marketing communication to segmentation for more Individualized Marketing, "You need to think about realigning your marketing organization to tackle all these things at once," says Osetek. "Teams need to be coordinating and working together across channels."



*You need to think about realigning your marketing organization to tackle all these things at once.*



## KEY LESSONS

- 1 Marketing executives must consider how best to align their teams' varied skill to better address Individualized Marketing opportunities.
- 2 Companies are increasingly using their customer databases to create relevant, individualized offers on a variety of channels.

These teams often bring different backgrounds and skill sets to the table, according to Osetek, but they now need to collaborate more closely on campaigns. Consumers don't exist in silos; they traverse multiple channels in their day-to-day lives and take input from a variety of sources when considering purchases.

Individualized Marketing must account for all of this, meaning each segment of the campaign must communicate with the others to ensure the right messages are being delivered in the right places at the right times. To do this, organizations can no longer have siloed teams manage individual channels – they must all work in unison to be aware of each interaction along the purchase journey.

While each member of the organization likely has unique and valuable expertise to offer, it must be considered a small piece of the whole. For example, while direct marketers come from a one-to-one marketing background, the creative and media groups have traditionally been mass marketers. It's all about marrying these skills in a way that creates a seamless consumer experience.

Says Osetek, "In a perfect world, you're bridging all these best-of-breed skill sets and processes together." In some organizations, he sees marketing executives beginning to address this by having the customer relationship management and media groups reporting directly to them, which he feels is a good first step in this direction.

“  
In a perfect world,  
you're bridging all these  
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and processes together.  
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Of course, technology is playing a key role in the Individualized Marketing revolution, on both the consumer and marketer sides. Resolution Media is already taking advantage of recent developments in Individualized Marketing to help its clients speak to individual customers. One such client is a large cable company. When customers perform a Google search for “buy cable TV” or “buy Internet” on their mobile phones, Osetek’s firm uses the mobile phone as an indicator based on geo-location to serve a specific, customized ad.

If the customer clicks on the Google paid ad that comes up and then proceeds to the landing page for that ad, says Osetek, “We’re creating upwards of 100–120 different variations of that landing page, with different offers based on that ad being tied to the client’s customer database.”

By the time the ad comes up in the landing page, Resolution Media already knows if the person is one of its client’s customers and which products or services that customer already has. For instance, the customer might have phone service but not Internet service. Armed with the information about what product sets the customer already owns, they can present different offers and pricing bundles that specifically speak to that person in an individualized fashion.

If customers find an offer appealing, says Osetek, “We have click-to-call capabilities, right on their mobile phone, that bring them directly into a call center. Their customer data is brought to the call center so the call center representative already knows who they are, what products they own, their address, etc.” That one-to-one experience in the call center is seamlessly transferred from the digital realm and customers’ mobile phones.

Thanks to rapid advancements in marketing technology, it is now more possible than ever to speak to customers in such an individualized way and track those interactions seamlessly across channels, often in a single dashboard for a complete view of the campaign’s effectiveness. If a particular portion of the campaign appears ineffective, marketers can easily re-allocate budgets; adjust copy and creative; and more, for rapid optimization that can positively impact the entire campaign, something that wouldn’t be possible in a siloed view.

By thinking carefully and holistically about your organization’s approach rather than haphazardly adopting new channel after new channel, including how your marketing organization is aligned and how it is leveraging the many channels and technologies now available, your company can lay the groundwork and successfully make the transition to Individualized Marketing.



*Data-driven marketing and public relations are ever more granular, allowing marketers to focus on and reach specific audiences with precision accuracy. It was never so affordable as it is today to use data efficiently and effectively to generate sales leads that convert into profits. The bottom line is that reaching the individual decision makers with data-driven marketing means many great returns on corporate investments in marketing.*



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## GINA FURIA RUBEL

President and Chief Executive Officer,  
Furia Rubel Communications, Inc.

# THE LEAP FROM BIG DATA TO INDIVIDUALIZED MARKETING



## TRINADHA KANDI

Specialist Leader, Digital Marketing and Analytics, Deloitte Digital

Trinadha Kandi has 15 years' experience in digital marketing, digital analytics, and marketing operations. As a technology expert on Adobe Marketing Cloud and the IBM customer experience analytics and campaign management platforms, he has worked on projects in numerous verticals. Kandi received the Award of Achievement in Web Analytics from the University of British Columbia, represented the Web Analytics Association from 2008 to 2010, and presented at the Digital Analytics symposium in India in 2012 and the DMA Conference 2014 in San Diego.



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Customers leave behind valuable data trails as they interact with brands, says Trinadha Kandi, a Deloitte specialist leader for digital marketing and analytics. He sees a lot of companies struggling to leverage that data. However, he asserts, it is the companies' responsibility to do just that.

Brands must become highly proactive, not just in collecting the information but also understanding and analyzing it, he says. "My advice to my fellow marketers is, consider your customer data as the powerhouse for your marketing efforts, and please don't take the data lightly!"

Kandi knows data. He started his career as an engineer and developer 15 years ago before transitioning into marketing analytics. As a consultant, he has worked with scores of clients across many industries. Individualized Marketing requires a lot of deep learning on the part of businesses, but he contends that there is no alternative. After all, he says, consumers increasingly are willing to give companies their information. They demand something of value in return. "I would expect you to really talk to me, understand my needs, and deliver those to me at the right time and the right place," Kandi says.



*My advice to my fellow marketers is, consider your customer data as the powerhouse for your marketing efforts.*



## KEY LESSONS

- 1 Consumers leave trails of data behind along their path through a brand's various touchpoints, but many companies struggle to respond.
- 2 Big data and the Internet of Things are converging to set the stage for Individualized Marketing companies who learn to tap into the powerhouse of consumer intelligence.

# THE LEAP FROM BIG DATA TO INDIVIDUALIZED MARKETING

He currently is part of a Deloitte project that is tackling that challenge. It is based on the premise that customers do not live on individual channels—they use email, tablets, PCs, mobile devices, in-store kiosks, and other brand-access points. Public details about the project are scant, but its stated mission is to connect the dots of consumer intelligence by orchestrating marketing, sales, and service teams to tear down organizational silos that inhibit data analysis. In the end, it hopes to help brands act on insights derived from rich consumer data, and to shape them into positive, holistic individualized customer experiences.

Kandi describes an example of how this approach can work. Suppose someone goes online to

book a room in a hotel where they have stayed in the past. The site recognizes them and automatically reaches out with a suite upgrade, as an appreciation of their customer loyalty. In the cab on their way to the hotel, they use their mobile device to select the exact room they want. Upon arrival, the mobile key app on their smartphone lets them bypass the counter and automatically check in. They can go directly to the room, which can be accessed using the smartphone key app. The hotel knows their individual preferences, and a welcome tray in their room is laid out with their favorite teas. Upon Checkout, they automatically billed on their smartphone app for any incidentals and the reward points are credited to their account.

“  
*I would expect you to really talk to me, understand my needs, and deliver those to me at the right time and the right place.*  
”

# THE LEAP FROM BIG DATA TO INDIVIDUALIZED MARKETING

“

*Today, in a fraction of a second, I can change my loyalty to a different brand if I don't get the experience that I want.*

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This example shines a light on where Kandi sees Individualized Marketing headed. The future, he believes, lies in the Internet of Things (IoT). Ever-connected consumer devices and applications—Apple Siri or Microsoft Cortana are early iterations—will allow brands to continually collect, harness, and refine customer data. It is a coming phase he calls moving “beyond digital.”

“It’s going to be an IoT and big data era,” Kandi states. Consumers are aware of this shift and are preparing to take advantage. Brands, even industries, will struggle if they fail to nimbly make the shift to Individualized Marketing

by converting consumer intelligence into the customized content, products, and services that consumers will demand.

The objective is not simply a matter of staying ahead of competitors. At least as important is a company’s ability to offer positive, individualized consumer experiences through “one-on-one” marketing. We are in a consumer-centric age, Kandi suggests, in which brands are forced to place the consumer experience at center stage. The impact, he says, is already being felt. “Today, in a fraction of a second, I can change my loyalty to a different brand if I don’t get the experience that I want.”



Every company creates content to reach and convert new customers. But the companies that are demonstrating massive improvements in marketing return on investment are the ones focused on data-driven processes and measurable results through highly individualized content that their customers actually want to read and share. Then they continuously optimize it through data insights.



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# MICHAEL BRENNER

Chief Executive Officer,  
Marketing Insider Group and author of *The Content Formula*

# INDIVIDUALIZED MARKETING TAKES TIME TO MASTER BUT IS WELL WORTH IT



## TIM BOURGEOIS

Partner at East Coast Catalyst,  
Founder of ChiefDigitalOfficer.net,  
East Coast Catalyst,  
ChiefDigitalOfficer.net

Tim Bourgeois is a digital industry veteran who has been active as a founder, investor, executive, publisher, and consultant since 1999. He formally entered the business in 1999, when he launched Pixel Bridge, a full-service interactive agency that was acquired in 2009. He is currently a partner at East Coast Catalyst, a Boston-based digital consultancy, and founder and editor of ChiefDigitalOfficer.net, a resource for senior digital professionals.



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Tim Bourgeois has three pieces of advice for marketers who are making the transition to Individualized Marketing. First, he says, “Don’t try to do it all in one fell swoop. It’s something that is very much a process.” It requires a learning curve, so developing your proficiency over the course of a two- or three-year period will be the most effective approach.

The second point, according to Bourgeois, is that you should not expect the technology alone to allow you to easily adopt Individualized Marketing as a principle or a practice. “The new tools and technologies are super-helpful, but they are just that—they’re tools,” he says. The secret sauce, Bourgeois believes, is really in the configuration and the campaigns. Maximizing their potential lies in the expertise and strategic mindset of the savvy digital marketers, campaign managers, and Individualized Marketing teams you might have within your organization.



*Don't try to do it all in one fell swoop.  
It's something that is a process.*



## KEY LESSONS

- 1 It takes time to become proficient in Individualized Marketing, but the results are well worth the investment of time and effort.
- 2 Ad spending is far more efficient than it was just a few years ago thanks to the arrival of technology that provides sophisticated identification and attribution capabilities.

# INDIVIDUALIZED MARKETING TAKES TIME TO MASTER BUT IS WELL WORTH IT

Third, Bourgeois advises marketers to be careful about how they manage internal communications about Individualized Marketing. This popular marketing strategy is receiving frequent coverage in the mainstream business press these days because it's so effective, he explains. "Just be careful about managing expectations up and across the organization, because it is going to take you a little bit of time to figure it out," says Bourgeois. Otherwise, you could potentially get into a situation in which you have over-promised and under-delivered in terms of what people can expect for a return.

Mastering Individualized Marketing takes time and effort, but it is well worth it. Because ad spending has become so much more efficient

than it was just a few years ago, the associated return on investment has also dramatically increased—and that, according to Bourgeois, is by far the biggest benefit.

Individualized Marketing has produced remarkable results for Bourgeois and his clients. In one case, he was working with a technology customer who had a specific offering for the financial services industry. "Using individualized techniques, we were able to focus in on the four or five geographic centers of their financial niche," he says. "It aligned pretty closely with big cities such as New York, Chicago, San Francisco, and Los Angeles."

*“We were able to increase the conversation rates by 250 percent over 45 days, which, otherwise, never would have...”*

“  
... been possible  
without these tools  
that were available  
to us.  
”

The goal of the campaign was to get potential customers to download a white paper and then engage with the company through a free trial. Says Bourgeois, “We were able to increase the conversation rates by 250 percent over 45 days, which, otherwise, never would have been possible without these tools that were available to us. That was just amazing.”

Such results have demonstrated to Bourgeois and his clients just how effective Individualized Marketing methods can be in realizing dramatically improved business value. Although it is important to invest the time necessary to fully learn and master the strategies involved, they can offer powerful benefits now and well into the future.



*Brands ignore opportunities to harness the true power of digital marketing—metrics. Instead they default to impersonal communications that lack the power to move visitors through the customer journey. By harnessing available metrics, firms can individualize the customer experience based on product interest, desired privacy, stage in the buying process, and other preferences that make consumers feel valued and develop a loyal relationship with customers. That's the Holy Grail offered by digital—not the ability to interrupt user conversations on social networks.*



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# ANGELA HAUSMAN

Owner,  
Hausman and Associates

# INDIVIDUALIZED ENGAGEMENT MUST HAPPEN AT JUST THE RIGHT TIME



## AMIY CHATLEY

Marketing and Research  
Analytics Manager,  
Everline

Amiy Chatley is an attribution analyst who has a passion for marketing and data. With a background consisting of four years in attribution and three years in robotics research, she brings an interesting twist to everyday analysis. Working with visualization tools such as Adobe Analytics and Tableau, her data-driven arts degrees allow for creation of engaging methods of data communication. Chatley's stance is the more data you have, the bigger the gems you can find.



Website

“Timing is important,” says Amiy Chatley. As a marketing and research analytics manager at a financial services company, she knows the challenges of pursuing an effective Individualized Marketing strategy.

As new customers interact with your company, your engagement with them transitions. Initial contact is generic or somewhat targeted communications, moving to individualized communications that identify the specific individual you are targeting and eventually to individualized communications that shape the engagement based on personal information volunteered by the customers and observations of their online behavior. If you individualize too early in the relationship, it can seem creepy. But if you wait too long, you miss the opportunity to make individualized offers.

“You need to find that sweet spot,” explains Chatley, “and it’s not always obvious when you should individualize customer communications.”



*It's not always obvious when you should individualize customer communications.*



## KEY LESSONS

- 1 One of the big challenges is being able to integrate insights at an individual level.
- 2 When Individualized Marketing works well, you see the paths customers take to their completion point grow shorter.

# INDIVIDUALIZED ENGAGEMENT MUST HAPPEN AT JUST THE RIGHT TIME

The information a company uses to decide when and how to individualize an engagement comes from the customers themselves, based on various touchpoints they encounter, their behavior at those touchpoints, and information they provide along the way. In Chatley's business, customers create accounts that contain personal information. The real fuel for Individualized Marketing, however, is the account-specific customer activity she can track across all channels.

Chatley says, "You need to be able to see everything customers do from the time they initially engage until a transaction of some kind occurs." She uses A/B testing at many touchpoints across all channels, which can include product offerings and display ads, and she logs the choices each customer makes at each touchpoint. Using this data and some analytics, it's possible to develop detailed profiles of individual customer preferences,

predict behaviors, and watch individual preferences evolve over time.

The real power of Individualized Marketing is being able to coordinate timely communications, for instance an email or text message that dovetails with a display ad, all presented at exactly the right time and place in the customer path. How well a business does this often depends on internal structural considerations, such as the degree to which channel operations are isolated from each other. One of the big challenges in Individualized Marketing is being able to push individual customer information back out to channels and marketing so they can act on it in a coordinated way.

"At our company we individualize wherever possible, applying that to a customer's touchpoints," says Chatley.

*"You need to be able to see everything customers do from the time they initially engage until a transaction of some kind occurs."*

# INDIVIDUALIZED ENGAGEMENT MUST HAPPEN AT JUST THE RIGHT TIME

To individualize a customer interaction effectively, different channels need to be able to share their engagement data and synchronize their cross-channel activities. Many companies are not yet set up to do this.

“Some industries, such as financial services, have legal restrictions about what they can share, even between different groups within the company,” says Chatley.

For instance, regulations put restrictions on moving certain kinds of data between systems. Systems that contain personal information, for example, may be restricted from sharing personally identifiable data with systems that drive display advertising. Regulatory requirements can restrict companies from using cross-channel individualized email strategies.

Chatley says, “In some industries, restrictions like this can make it difficult to link customers between different systems used by different parts of an organization.”

Still, individualized data can be leveraged in other ways. Chatley’s financial services company uses personalization for outbound communications.

Detailed, individual customer information becomes important in timely offers of products tailored to that individual.

“We use individualized data internally to assess customer risks and make decisions about particular offers to specific individuals,” says Chatley. Email is one channel that uses individualization effectively. Display advertising is more difficult.

As Chatley explains, “In our industry, it’s somewhat more difficult with display advertising because it’s harder to gauge exactly the right tone in the context of the page a customer is viewing.”

When Individualized Marketing works well, you see that the paths customers take to their completion point grow shorter.

“If a customer comes back and receives appropriate individualized treatment early on, that customer is more likely to return,” says Chatley. “When the customer returns and is engaged straightaway, you can minimize the time to complete a favorable transaction.”



*If you are interested in the fastest and easiest way to reach your clients with individualized, data-driven marketing, start with optimizing your website's search experience. You'll unlock huge return on investment and use it as a basis to individualize even more from there.*



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# MIKE MORAN

Senior Strategist,  
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# NEVER UNDERESTIMATE THE POWER OF PARTNERSHIPS



## TIM HERNQUIST

Former Vice President,  
Marketing, North America,  
Sony Mobile Communications

Tim Hernquist positioned, priced, and promoted consumer electronics products to diverse global consumers and valued partners throughout his 17-year international career at Sony. Most recently, as vice president of marketing for Sony's North American mobile business, his leadership produced unique vendor-specific propositions to connect individualized consumer entertainment experiences across devices, with big names like Michael Jackson and The Foo Fighters. Beyond Sony, Hernquist engages in supporting a variety of companies in their future marketing efforts.



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Device manufacturers have limited access to the volume of consumer data that Internet-driven businesses, such as telecoms, gather from their subscribers or banks from their online account holders. This lack of directly accessible data poses a challenge for Individualized Marketing.

Tim Hernquist is a former vice president of marketing at Sony Mobile Communications, which produces mobile phones, laptops and wearable devices. He notes that Sony Mobile has an advantage over most manufacturers. Its parent owns major movie studios, record companies, and the PlayStation gaming platform, which combine to produce vast quantities of content that the mobile division could leverage in its Individualized Marketing efforts.

“With the help of their data and their understanding, we could attach a piece of entertainment specifically to a person who would be engaged by that content,” he says. Matching the content to the hardware allowed Sony Mobile to engage in some forms of connected interactions with the device’s owner, he adds.



*With the help of their data and their understanding, we could attach a piece of entertainment specifically to a person who would be engaged by that content.*

## KEY LESSONS

- 1 When it comes to Individualized Marketing, manufacturers are challenged by their inherent lack of direct, consumer-derived data.
- 2 Corporate collaboration may be a pathway for both sides of the partnership to gain big wins from Individualized Marketing.



# NEVER UNDERESTIMATE THE POWER OF PARTNERSHIPS

“We were quite competent in being able to amplify mobile-operator messages throughout our entire customer relationship management (CRM) databases,” Hernquist observes. But the basic problem remained—Sony Mobile’s lack of directly-accessible consumer data. What’s more, even in the best of circumstances, it was always a struggle to draw customer information from internal, siloed databases, he says.

However, Hernquist sees another potential pathway for manufacturers to Individualized Marketing: it lies in partnerships. Device manufacturers already share important relationships with third-party partners, such as Verizon, Google, and others who provide the services and apps people use on their mobile devices. Why not take that a step further? Why not enter into data-sharing arrangements with those

outside partners and spearhead joint Individualized Marketing programs? “If you try to create it all by yourself, you might create a pretty good universe,” Hernquist states. “But that might be only a fraction of the available consumer base you could actually reach, if you team up and work with partners closely on sharing data.”

He describes one possible scenario: a potential Sony Mobile’s telecom partner, Verizon for example, is a high-profile National Football League (NFL) sponsor that gets massive exposure during televised games. Theoretically, if Sony Mobile and Verizon teamed up for Individualized Marketing, Verizon could share with Sony its individualized data on who signs up for its NFL Mobile app, and opts-in for communications. That would be a huge win for Sony.

“  
You can potentially cross-sell or upsell existing consumers to additional products or services. You can create additional uses for customer data streams.  
”

“  
Use partnerships  
to take advantage  
of additional  
opportunities in the  
individualized plan.  
”

Conversely, if the customer is using a Sony phone to access the NFL app and watch the game, chances are the same customer also owns a PlayStation terminal, according to Hernquist. That opens up new marketing vistas for Verizon. Verizon could send a premium Verizon offer to a Sony PlayStation opted-in customer, for instance. That kind of teamwork could help solidify that customer's loyalty to both partners, he says.

Collaborative partnerships could establish a framework for Individualized Marketing. “You roll out things like advanced offerings to e-commerce,” Hernquist states. “You can tailor messages through e-CRMs. You can potentially cross-sell or upsell existing consumers to additional products or services.

You can create additional uses for customer data streams.”

His advice to executives embarking on Individualized Marketing is to first create a detailed marketing plan that includes multichannel engagements and messaging that leverages insights pulled from individualized data. In his opinion, that plan should include the possibility of outside corporate collaboration. “Don't discredit the power that you can have by creating a partnership with someone and potentially attaching yourself to new and unexplored markets—or even groups of individuals or consumers—that other people are holding,” Hernquist offers. “Use partnerships to take advantage of additional opportunities in the individualized plan.”



Consumer brand marketers have become quite adept at personalized, data-driven marketing (some might even say too effective, considering incidents like Target knowing the teenager was pregnant before her family did). But business-to-business (B2B) marketers need to start catching up, given the growing number of buyers who now expect the same level of sophistication in business procurement as in their consumer lives; 52 percent of B2B buyers say they expect half of their purchases to be made online by 2018. B2B marketers will need to invest in new platforms and integration with existing systems while figuring out how to use client data, appropriately, to improve online sales as well as the customer experience.



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