

How to Make Every Customer Touch Point Count!

April 3, 2014

A special thank you to:



Thank you for joining us – we will be starting at 2:00 PM ET/11:00 AM PT

If you are unable to hear music at this time, please make sure that your computer speakers are turned on and that your system has not been muted.

#TMGWebinar

Today's Speakers



Carolyn Goodman

President/Creative Director
Goodman Marketing Partners



Linda West

Manager of Demand Generation
Act-On Software

Moderator



Thorin McGee

Editor-in-Chief
Target Marketing

#TMGWebinar

Tips for Webinar Attendees



- **Technical difficulties?** Let us know by using the “Q and A” box, or trouble-shoot by clicking the “Help” widget below

→ **Quick tip:** Common problems (like loss of sound and/or stall in the slides) can often be fixed by a quick refresh of your browser.

- **Have a question for today’s speaker?** Submit via the “Q and A” box
- Please **disable pop-up blockers**



- **See what this console can do!** Click on the “Tips for Attendees” widget for the complete rundown.

Don’t forget to “share” this webinar!



#TMGWebinar

DATA-DRIVEN MARKETING

Demographics + Persona + Behavior

The Buyer's Journey has Changed...

Consumers direct their own buying journey

- 78% start the buying process with a web search
- 50% turn to social media and peer reviews



Source: DemandGen Report

Digging Deeper: Three Layers of Segmentation



Demographics



Psychographics (Persona)



Behavior

1 THREE LAYERS OF SEGMENTATION



Demographics & Firmographics

You've got this covered!



Age: 25

Gender: Male

Location: New York, NY



Psychographics (Persona)

- Avatars for your primary buying groups
- Defines buyer's personality, values, attitudes, interests, and lifestyle
- Defines buyer's primary goals & concerns, as related to your product

Data Collection - How

- Customer focus groups
- 1-to-1 customer interviews
- Internal interviews

Data Collection – What

- What is their job level and job function?
- What keeps them up at night?

- What are their personal and professional goals / aspirations?
- Where do they spend time online?
- What problem do you help them solve in their day-to-day lives?
- What do they perceive as valuable?
- What some common objections your product or service offering?



Age: 25

Gender: Male

Location: New York, NY

Job Title: IT Director

Goals: Seeking a promotion within 12 months

Characteristics: Tech savvy, ambitious,

Spends time online at: Industry blogs, twitter, linked in, reddit

Behavior

- Online brand interactions including email clicks, website visits, social interaction, etc.
- Offline brand interactions including event attendance, sales conversations, etc.

Data Collection - How

- Marketing Automation Technology

Data Collection – What

- Website visits (content, path, and conversion event)
- Email opens & clicks
- Social activity
- Event attendance
- Sales & customer service interactions



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Recent Activity: Visited the company website within the past 7 days, downloaded a whitepaper comparing patch management software vendors

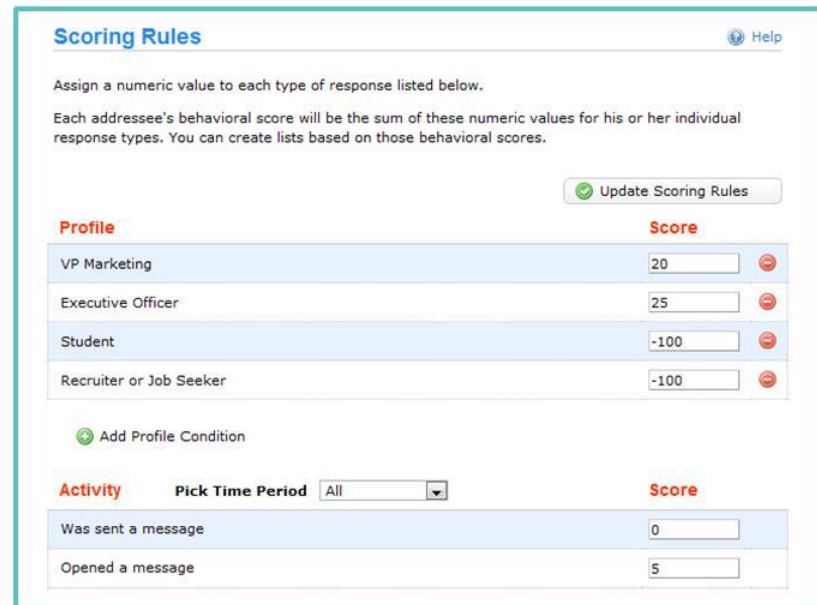


LEAD SCORING PROGRAMS

Q: So how do you aggregate this data into an actionable format?

A: Create a lead scoring program, of course.

- Automatically give points to leads based on behaviors or profile attributes
- Allows marketing & sales to sort and prioritize leads
- Marketing can nurture leads with lower scores before passing off to sales
- Re-establishes trust



Scoring Rules [Help](#)

Assign a numeric value to each type of response listed below.

Each addressee's behavioral score will be the sum of these numeric values for his or her individual response types. You can create lists based on those behavioral scores.

[Update Scoring Rules](#)

Profile	Score
VP Marketing	<input type="text" value="20"/>
Executive Officer	<input type="text" value="25"/>
Student	<input type="text" value="-100"/>
Recruiter or Job Seeker	<input type="text" value="-100"/>

[Add Profile Condition](#)

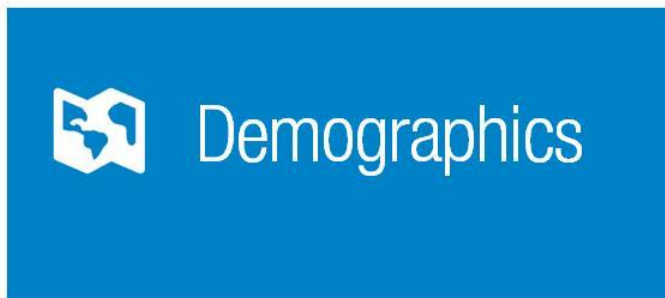
Activity	Pick Time Period	Score
Was sent a message	All	<input type="text" value="0"/>
Opened a message		<input type="text" value="5"/>

Lead scoring gives your company an objective system for ranking your leads.

Most scoring systems use ranking criteria that fall into two categories:

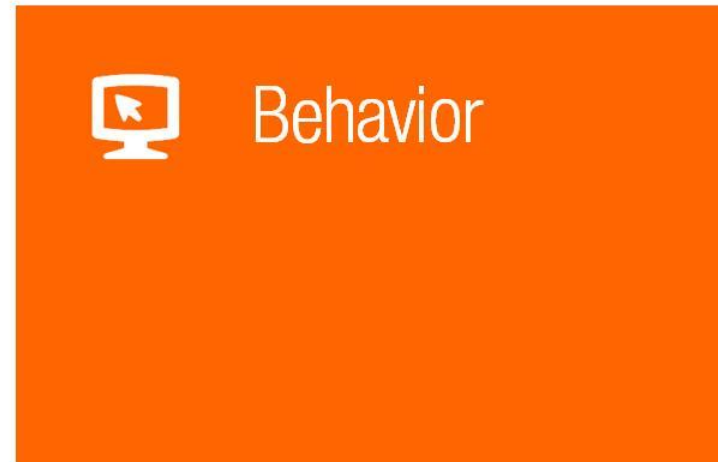
Group 1: Profile

Is the user qualified to buy?



Group 2: Behavior

Is the user engaged w/ the brand?



EXAMPLE

- You're a small software company that sells patch management software.
- You have two offices, one in Asia and one in the US, but you aren't global yet.
- Your software isn't cheap, so you need prospects with reasonably large budgets.

Group 1: Profile – is the user qualified to buy?

Registration Question	Excellent Prospect		Okay Prospect		Bad Prospect	
Job Title	IT Director	5	System Administrator	3	Sales Engineer	-4
Location of Headquarters	United States	5	Hong Kong	4	Romania	-5
Company Size	> 5,000	4	1,000 - 5,000	2	< 1,000	-2
Industry	Information Technology Services	5	Computer Software	4	Automotive	-5
Budget	> 50,000	4	10,000 - 50,000	3	< 10,000	-2

Group 2: Behavior – Is the user engaged with the brand?

Behavior	Point Value
Visitor downloaded the How Do We Compare To Our Competition white paper	5
Visitor browsed company website multiple times in the past 7 days.	5
Visitor downloaded the Evaluation Guide.	5
Visitor is already a lead in the sales system.	4
Visitor clicked on company's Jobs web page.	-5



Lead Score: 20

Age: 25

Gender: Male

Location: New York, NY **+5**

Job Title: IT Director **+5**

Goals: Seeking a promotion within 12 months

Characteristics: Tech savvy, ambitious,

Spends time online at: Industry blogs, twitter, linked in, reddit

Recent Activity: Visited the company website within the past **+10** 7 days, downloaded a whitepaper comparing patch management software vendors

UP TO 70%

of sales leads are not properly leveraged or are completely ignored, thus wasting marketing program dollars.

The average lead generation ROI for organizations using a lead scoring process is

138%

VS.

78%

lead generation ROI from those surveyed who were not using a lead scoring process.



BEHAVIORAL BUILD-UP: LEAD NURTURING

Q: Engagement with my brand is low. How do I encourage more interaction?

A: Create a lead nurturing program, of course.

80% of the prospects deemed
“bad leads” by sales go on to
buy within 24 months

Lead nurturing is an automated email program that encourages prospects to interact with your brand.

Lead nurturing allows you to send highly targeted messages based on the three layers of data you're collecting



Demographics

- Dynamic messages based on firm size
- Email release times based on location



Persona

- Message content positioned around goals, aspirations, and pain points



Behavior

- Reminder emails to non-responders
- Triggered messages based on web activity

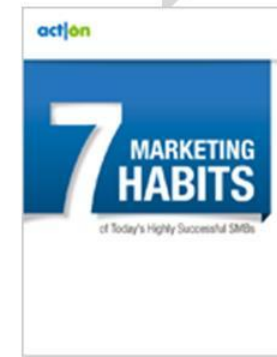
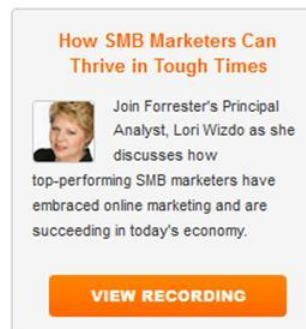
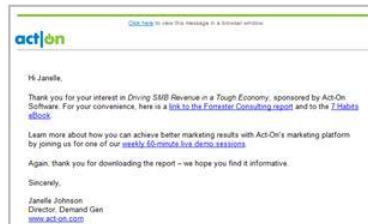
Whitepaper
Download

Confirmation
Email with link
to asset

Recorded
webinar on
same topic

eBook on
similar topic

Corresponding
Infographic



Companies that excel at lead nurturing generate **50% more** sales-ready leads at **33% lower cost**.

- Forrester Research

How to Make Every Customer Touch Point Count!

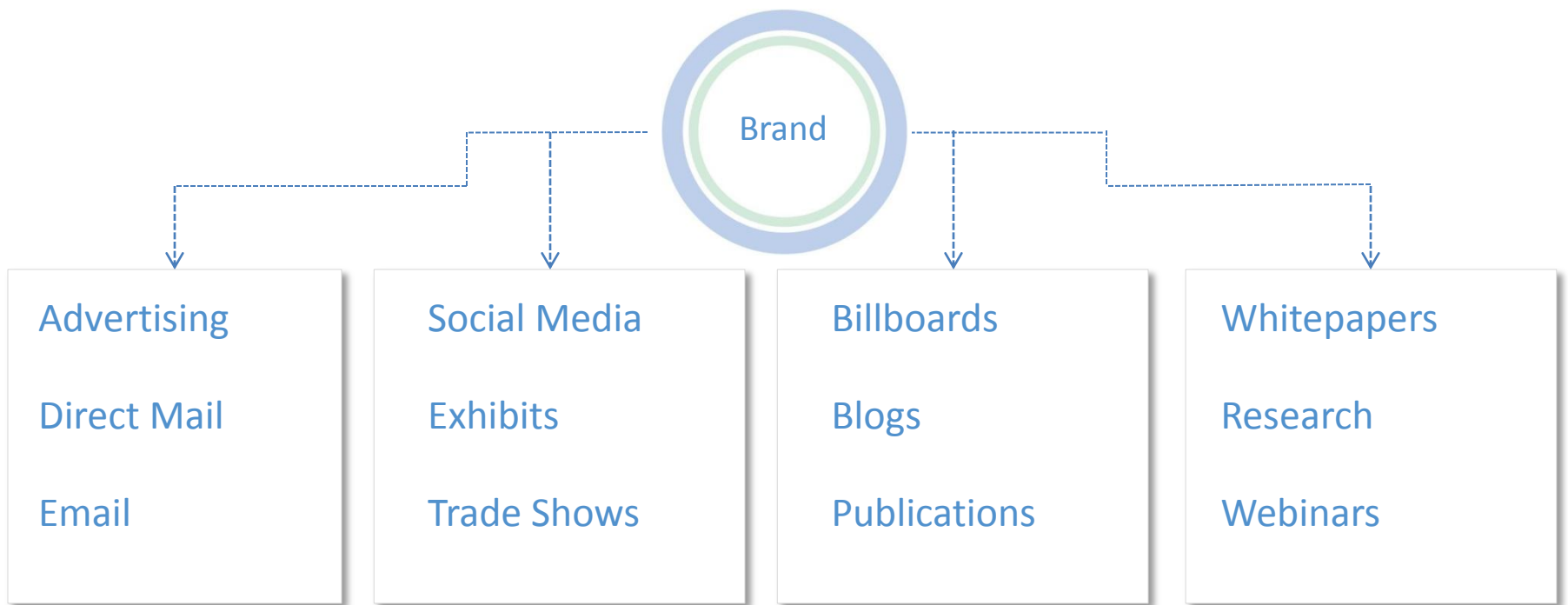


April 3, 2014

00:1

00:2







Positive brand experiences



Negative brand experiences



- First Name
- Last Name
- Street Address
- Street Address 2
- City
- State
- Zip
- Title
- Company Name
- Industry Type

10 Ways Healthcare Facilities are Using Video Conferencing to Improve Patient Outcomes, Increase Revenues, and Reduce Expense.

Whether managing a large urban hospital or a small rural facility, healthcare IT managers report that video conferencing has successfully addressed a host of educational, managerial, and patient challenges.

After conducting lengthy interviews with seven healthcare across the U.S., researchers report that video conferencing least 10 key challenges which have impacted their organization. Specifically, video conferencing has helped healthcare facilities to:



Healthcare Targets

Even though we have increased the usage of and

1. Increase patient access to specialized services. Video conferencing has allowed one hospital to provide care to patients from other locations. By providing community care, patient outcomes are improved. "We can't seem to recruit physicians. They leave after a year. Video conferencing allows us to provide certain specialized services."

2. Improve delivery of treatment. The remote to any hospital in the system at a 600-bed teaching hospital and status of patients are monitored via video conferencing. "We have never changed our treatment order down unit. We have never changed our treatment order down unit. We have never changed our treatment order down unit."

3. Reduce the need to transfer patients. Video conferencing to provide specialized services for a hospital. In the past, these patients would be transferred to other hospitals.

4. Recruit top doctors. Technology is an important element in recruiting physicians. "We have never changed our treatment order down unit. We have never changed our treatment order down unit."

5. Achieve acquisitions strategies. Video conferencing has been able to add new facilities without the expense of travel and the expense of integrating the conferencing.

10 Ways Financial Services Companies are Using Video Conferencing to Reduce Staff, Extend Specialty Services, and Increase Profitability.

While researching some of the current challenges faced by the financial services sector, IT managers report that video conferencing has successfully addressed a host of managerial and educational challenges at their organizations.

After conducting lengthy interviews with six IT managers nationwide, researchers report that video conferencing has helped them overcome a number of issues including:

1. Extending specialty services. As one IT manager notes, "Customers want trust, mortgage, and other specialized personnel in their local branches but we just can't afford to have these personnel at each location." Video conferencing allows the organization to provide these services through existing branch facilities while providing clients the ability to meet and work with specialists face-to-face in a confidential setting.

2. Ensuring professional certification. By helping staff attend classes held in a remote location, video conferencing provides a simple way to help employees gain and maintain their professional certification. As a result, more employees are able to attend training sessions within their regular work routines, as opposed to having to block travel or study time away from the office. Consequently, there has been a reduction in last-minute crises over lapsing certifications.

3. Boosting employee confidence in top executives. Many chief executives are dedicated to closing the gap between themselves and far-flung employees. "Our CEO wants to get closer to the employees and become recognized as approachable," says one IT director. For example, at one central Pennsylvania firm with 21 locations, the CEO uses video conferencing for quarterly town hall meetings, where he presents the financial results to the entire company each quarter. The company believes that seeing the chief executive face-to-face encourages employees to have confidence in management, and thus reduce

locations. When operations video conferencing to

ensure all their locations are informed at the same time. As one IT director says, "Bank regulators require that we get all newly acquired units operating according to a uniform set of institutional standards — quickly."

5. Improving call center profitability. A New Jersey pension management firm knew its remote call centers would not affect profitability if the savings in salaries were consumed by the cost of travel between the locations. By establishing a video conferencing system, the organization created an always-available, low-cost method of corporate communication.

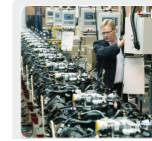


"People were driving all over the place. The time. Every time a taller [alt] we had to send a corporate trainer out to train the replacement."

"Our CEO wants to get closer to the employees and become recognized as approachable."

10 Ways Major Manufacturers are Using Video Conferencing to Increase Business Volume and Decrease Costs.

From managing global supply chains to grappling with shortages of skilled workers, manufacturers are addressing a host of educational and managerial challenges in today's marketplace. After conducting lengthy interviews with six IT managers at manufacturing facilities across the U.S., video conferencing has emerged as the key to solving a host of manufacturing challenges including:



Manufacturing Targets

Even though we have increased the usage of and

1. Execution of better RFQs that win more business. A large manufacturer in Missouri uses video conferencing to help his team "walk through" RFQs. This allows multiple departments to brainstorm and get started on the different sections of the RFQ in a fully-integrated and coordinated manner. The manufacturer has won more business and generated additional revenue.

2. Enforcing quality assurance policies and procedures. Video conferencing formalizes the communication process to ensure foreign partner U.S. standards. As one IT director states, "Video conferencing to snap inspect our Chinese partner's production to be sure they're accountable to our standards."

3. Finding and screening new offshore partners. Just as HR does business development teams use video conferencing to conduct potential partners in India and other offshore locations. Through equipment, staff can see the people and their facilities and get the business environment. Time and money are saved by doing from home. By the time the team traveled to the site for final selection, they already narrowed the pool to a handful of companies worth visiting.

4. Controlling international production processes. Video conferencing allows manufacturers to see work in progress around the world on a daily basis. In the past, seeing the far-flung production facilities was limited to a year, thus reassuring management that projects are moving forward on schedule.

5. Improving customer relationships. As new customers require daily video conferences in the start-up phase keep new projects on track and increase customer satisfaction.

10 Ways Utilities Companies are Using Video Conferencing to Increase Access to Real-Time Information and Improve Transfer of Knowledge.

From dealing with global supply chain issues to grappling with shortages of skilled workers, utilities companies face a host of managerial challenges today and in the near future. But after conducting lengthy interviews with five IT managers in the utility sector, it has been discovered that video conferencing can help solve these challenges and more in including:

1. Retention of highly-skilled workers. Retaining highly technical employees is always challenging. One major utility company in New Mexico has retained technical specialists who wanted to leave the area by letting them use video conferencing to interact with field operations remotely. "Say a maintenance guy goes to a pump that isn't working," explains an IT director. "Using this special camera, the maintenance guy sends pictures in real-time to a tech that specializes in that pump to help resolve the problem — it doesn't matter where the specialist is physically located." As a result, productivity increases along with employee satisfaction.

2. Standardizing work processes. The global nature of the utilities business demands that work processes in refineries be standardized to streamline operations and create an international workforce that can operate efficiently at any location. Video conferencing helps streamline the training process while permitting reduction of redundant staff in multiple locations.

3. Leveraging technical expertise across disparate locations. One utility uses mobile units so refinery maintenance staffs can transmit what they are seeing at a problem site to tech support in another location, facilitating diagnosis and solution from anywhere in the world. As a result, fewer technical experts are required on staff, and travel costs are reduced.

4. Increased knowledge transfer from retiring workers. By hosting live video training, new trainees get "on-the-job" training travel. As the workforce ages, one utility sees the transfer of specialized job skills and of our pre-retirement-age employees to younger

5. Keeping staff up-to-date on frequently changing policies. Policy dictates that if a drop of oil is spilled, it must be cleaned up in exactly the same manner regardless of where the incident occurs. In this ever-changing world, regulations for such processes alter frequently, as do the organization's procedures for handling them. One South Dakota energy company relies on video conferencing to train affected employees at every location in exactly the same way, which assures company-wide compliance without the additional time and expense of sending trainers to each location.



"By using video conferencing... real time data are processed by experts and displayed graphically in seismic models. This enables us to advise the drilling crew exactly where to drill, and gives the technicians on shore the ability to support several rigs."

Financial Services Targets

Utilities Targets

TANDBERG
See: performance

TANDBERG
See: performance

GOODMAN
MARKETING
PARTNERS

- Significant Anniversary Date
- Children's birthdates (Month/Year)

From: AAA <AAA@email.goaaa.com>
To: Carolyn Goodman
Cc:
Subject: Awaken Your Senses in Africa + Caribbean Cruises

Sent: Fri 3/21/2014 6:50 AM

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Caribbean Cruises for All Generations

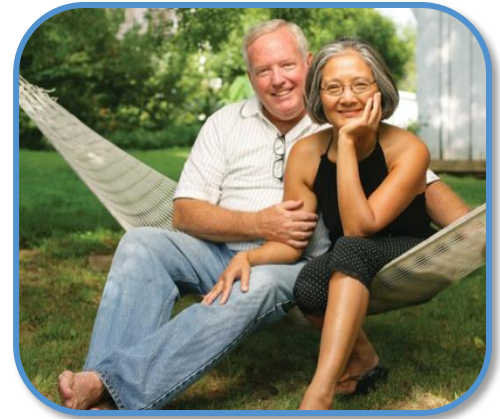
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Young Children



Teenagers



No Children /
Empty Nesters



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Start Planning



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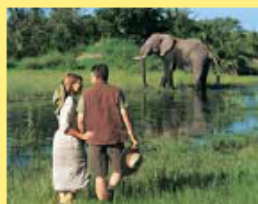
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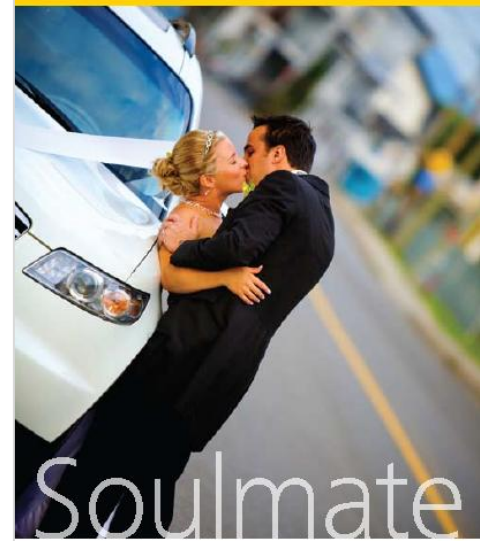
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- Email open rates were 365% higher than the “generic” style benchmarks
 - Click thrus range from 1% - 20%
- Event triggered emails (Happy Birthday; Happy Anniversary): 77% open rate
 - Click thrus as high as 26%

New couples



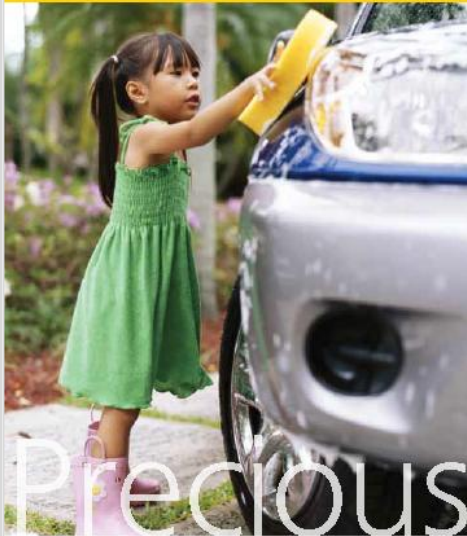
Soulmate

new
Life is a journey for two.



Newly Married

Young families



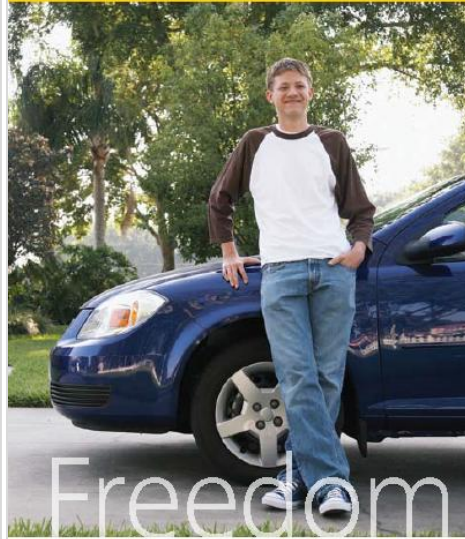
Precious

with children
Life is an ever-changing journey.



Young Children

Parents of teens



Freedom

THAT JUST STARTED
Life is a journey.



Teenagers

Empty nesters



Reconnect

continuing
Life is a journey.

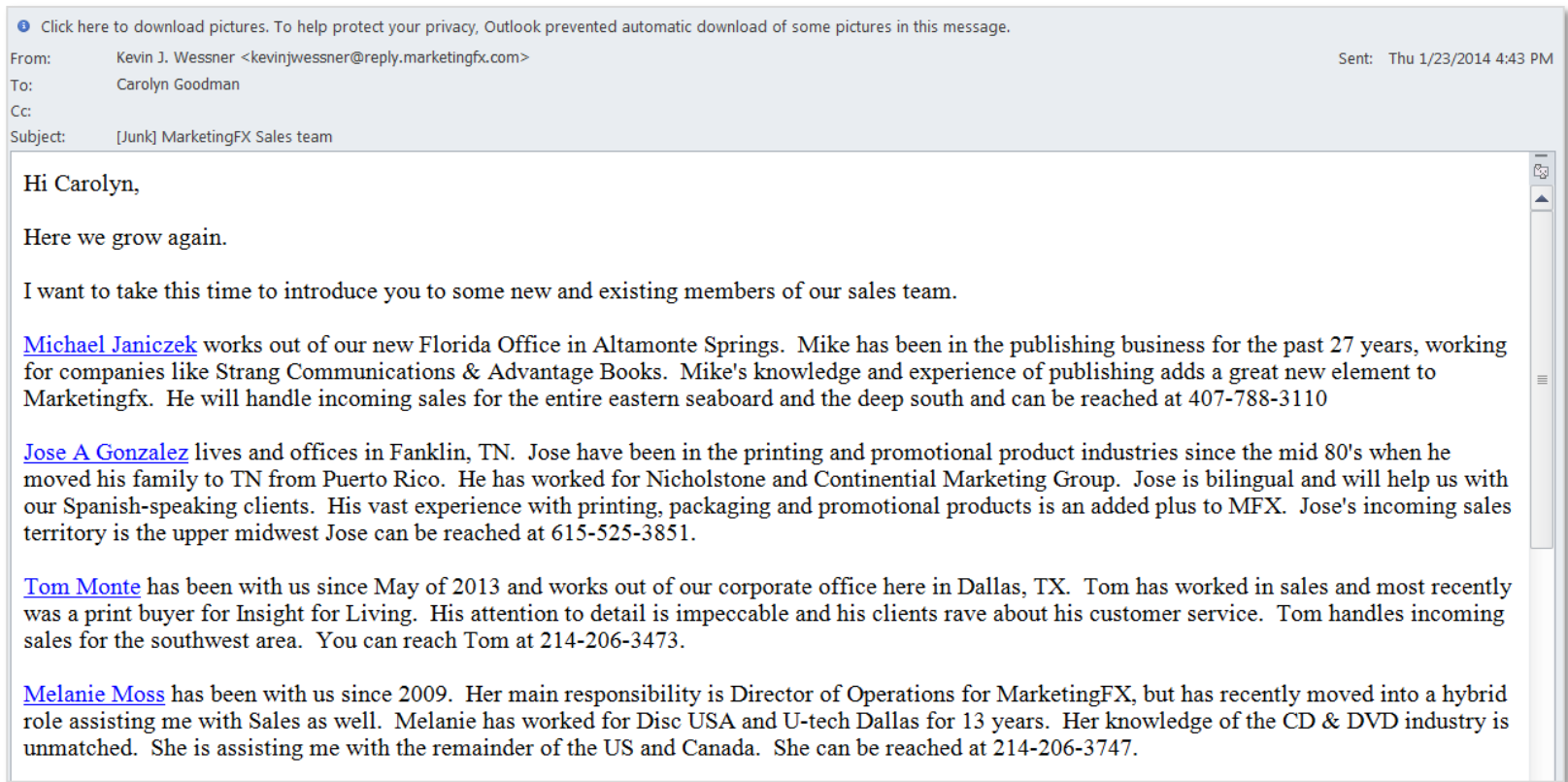


No Children /
Empty Nesters

What do you want from me?

Reason for making contact

- What do you want from me?





Login

Email Subscription Management

Please check the types of communications to opt-out "carolyn@goodmanmarketing.com" from.

Email Preferences

Emails are sent to **carolyn@goodmanmarketing.com** [Update Email Address](#)

Email Format (*HTML or Plain Text*) HTML

Subscriptions

General Communications

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Monthly Specials

Subscribe ☒ Unsubscribe ☐

Any digital marketing from this company

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Save Updates

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- Get up to **5 gallons** of free fuel and free delivery
- Benefit from a **\$100 locksmith** reimbursement on your vehicle **and your home**
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From: MarketingSherpa <reply@reply.marketingsherpa.com>
To: Carolyn Goodman
Cc:
Subject: Reader Favorites: Content marketing, competitive messaging and critical website elements

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MarketingSherpa's Audience Favorites from March 24 - 31, 2014

Content Marketing: Tips from your peers on making use of internal resources

Content marketing is major piece of any digital marketing strategy, particularly for B2B marketers. White papers, ebooks, infographics, videos and podcasts can be created by the marketing team or come from experts inside your organization. Read this MarketingSherpa Blog post for tips on making use of internal resources.

As seen in MarketingSherpa Blog email updates

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marketing

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Marketing](#) ›
Product marketing
and
e-commerce case
studies

Typos and errors and blunders, oh my...

From: becky verner-ecrm [<mailto:beckyverner@ecrm.marketgate.com>]

Sent: Tuesday, February 01, 2011 9:56 AM

To: Denise Williams

Subject: Meeting request on behalf of Dixon Ticonderoga Company

Denise,

I have worked with ECRM for years and I have attended many of their events as a "seller". I am looking forward to attending their new event, the *Customer Centric Marketing Planning Session* on March 14-16 in Rosemont, Illinois, as the "buyer". I hope to meet privately you and others to discuss the options you offer for building a non-traditional marketing strategy for <BuyerCompanyName>.

ECRM provided me a list of topics and I have copied my interests below:

Interactive Marketing

- Customer Centric and Loyalty Marketing
- Database Analysis and Research
- Customer and Promotional Insights
- Social and Mobile Marketing
- Digital, Internet and Email Marketing

If you decide to attend, please contact Larry Ishii at lishii@ecrm.marketgate.com or 909-217-8760 to schedule our meeting.

Thank you,

Cody Aagard

Director of Retail Sales

Dixon Ticonderoga Company

-----Original Message-----

From: The Good Group <Info@goodgroupllc.com>

To: Denise <cme4direct@aol.com>

Sent: Wed, Feb 2, 2011 4:09 pm

Subject: =?utf-8?Q??=Denise, Are You Right on Time, Right on Target?




Mistake

Apologize

Don't
Apologize

- Subject Line Only

 If there are problems with how this message is displayed, click here to view it in a web browser.

From: Motley Fool Million Dollar Portfolio <fool@foolcs.com>

To: Carolyn Goodman

Cc:

Subject: Correction: Today's Live Advisor Roundtable With Tom Gardner and Ron Gross Is at 5 p.m. ET

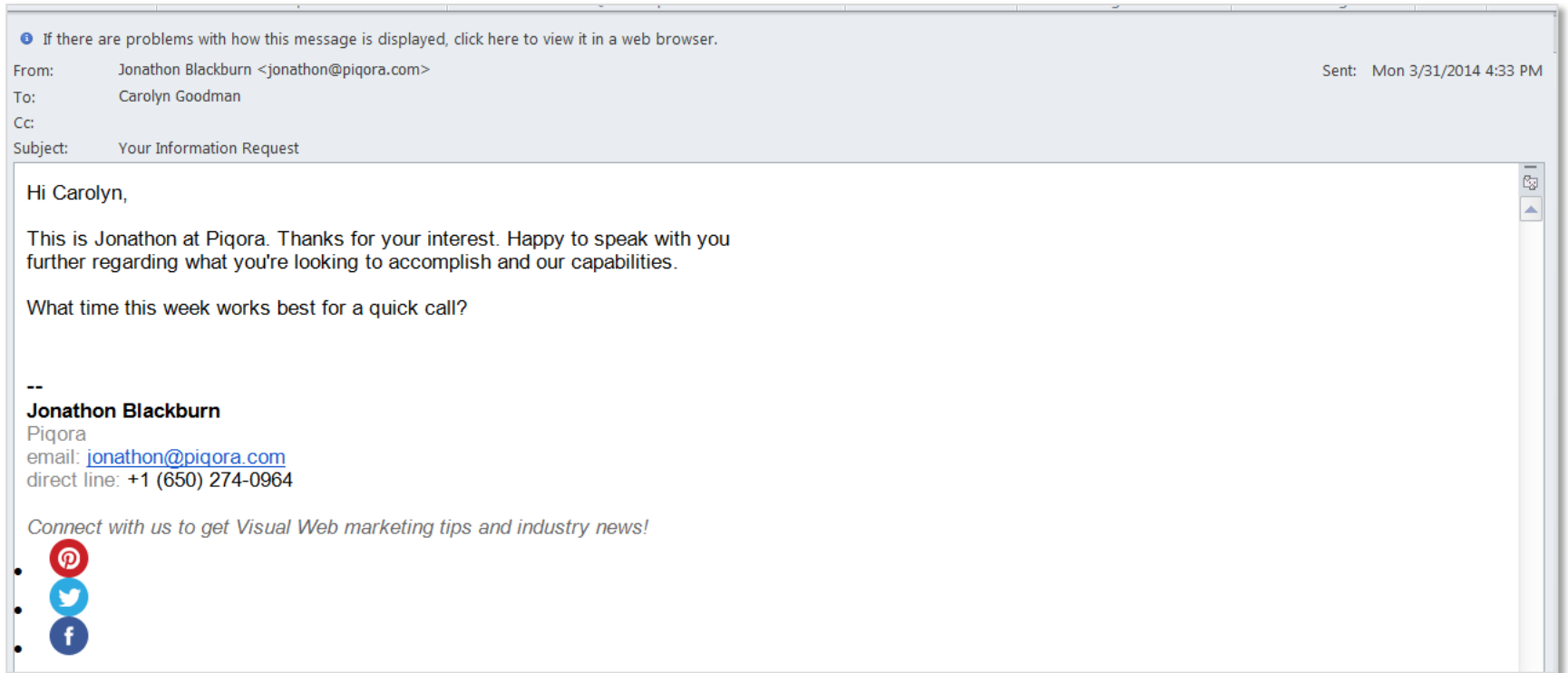
- Subject Line Only
- Pre-header Message

Correction: If you received this email with a Bill Me Later Banner, please note that Bill Me Later Promo is not available in CompUSA. Please accept our apologies for any inconvenience this may have caused you.

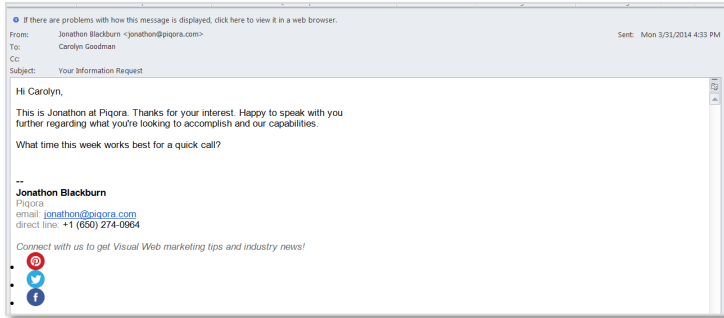
- Subject Line Only
- Pre-header Message
- Dedicated Email

Things That Turn Off Customers/Prospects

- Timing and content of a follow up email



Instead of this...



Try this...

Remind me what I did

Give me more help

Tell me why you're the expert

Give me multiple ways to learn more

Dear Carolyn,

Thank you for downloading our recent Case Study, which demonstrated how Cathay Pacific Airways dramatically increased their social media presence by leveraging [Piqora](#) marketing software and built-in analytics tools.

Looking for [tips](#) on how to leverage the Visual Web? Sign up for our [weekly newsletter](#) and stay on top of the latest trends.

At Piqora, we help brands optimize and leverage the Visual Web by:

- Identifying and connecting with influential brand advocates
- Leveraging hashtag uses
- Increasing social media likes
- Driving revenue through social media

I'd be happy to show you our product in action with a live demo, or share additional Case Studies. Or perhaps you'd like to join us at our [upcoming webinar](#) where we discuss how Piqora works and how top brands are leveraging the technology.

Let me know how I can help you and your brand make the most of the Visual Web.

Jonathon Blackburn
Email:
Phone:





Dear Angie,

Whatever kid got a Super Burrito for dinner is a heckuva lot luckier than I was when I was younger. I was practically malnourished. If my family took me to a Mexican place, I'd probably be forced to get one lettuce taco. Like I said, lucky kid got a Super Taco. I'm still not over it. Hope y'all enjoyed!!

Patrick

Reason for making contact?

Instead of this...

Dear Angie,

Whatever kid got a Super Burrito for dinner is a heckuva lot luckier than I was when I was younger. I was practically malnourished. If my family took me to a Mexican place, I'd probably be forced to get one lettuce taco. Like I said, lucky kid got a Super Taco. I'm still not over it. Hope y'all enjoyed!!

Patrick

Try this...

Dear Angie,

Thank you for your recent burrito order!

To show you how much we appreciate your business, I'd like to invite you to try one of our new taco salads, on me. Just put the words "Patrick" in the promo box when you place your order online.

We're always looking for ways to improve our products and our service, so if you have any suggestions, feel free to email me directly at Patrick@burritos.com.

Patrick



Thank you!



Carolyn Goodman
President/Creative Director
Goodman Marketing Partners

E: carolyn@goodmanmarketing.com

P: 415.507.9060 x222

www.goodmanmarketing.com

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Web www.act-on.com

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Technology Fast500

The Forrester logo, with the word "FORRESTER" in white capital letters inside a dark green oval.

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Question & Answer Session

If you haven't done so already, please take this time to submit questions to our speakers using the "Q&A" box on your console.



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