Delivering Harmonious Customer Experiences with Orchestrated Marketing Campaigns

Matching the right customer with the right message at the right time takes careful planning and orchestration.

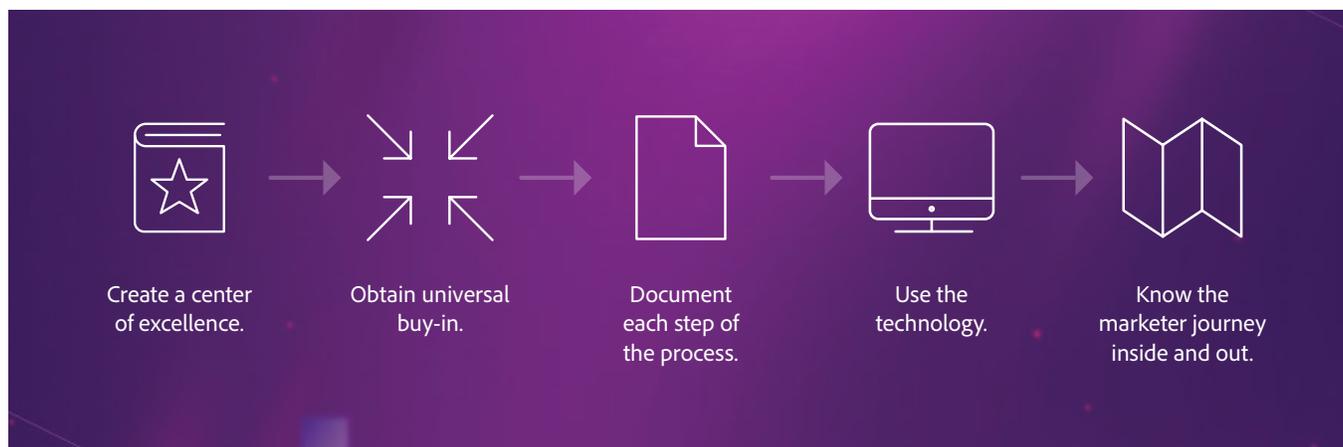**My name is Dave Bilbrough,** *and I'm an enterprise platform architect with Adobe.*

If there's one thing I've learned after helping countless brands personalize their cross-channel customer experiences, it's that nothing worthwhile is achieved overnight. This is certainly true of campaign orchestration. Meeting the right customers on the right channel at the right time is the result of a coordinated effort over time that eventually results in customer experiences that are both personal and meaningful.

The need for ongoing effort may discourage some, but if you're going to execute effective campaigns, you'll realize that it's a journey of bringing the right elements together and regularly monitoring and fine-tuning your efforts. However, that doesn't mean you can't expedite those efforts. I notice three common pitfalls that sum up the vast majority of customer setbacks when working to coordinate better campaigns. If you can avoid them, you'll already be off to a great start.

First, many brands don't plan to evaluate whether or not their messages, timing, and audiences are correct. Without a way to see what's working and what isn't, you'll have a hard time reaching your goals or justifying your investment.

Second, many marketers spend way too much planning time talking about specific campaigns with specific examples. Instead, they should be talking about campaign management as a whole and not get caught in the weeds.

Third, most customers only plan for one massive delivery, instead of iterating data sources and processes over time. Remember, it's a journey. Like any good journey, successful campaigns start with careful planning, company-wide cooperation, and continuous practice.

| Create a center of excellence. | Obtain universal buy-in. | Document each step of the process. | Use the technology. | Know the marketer journey inside and out. |

Here are five steps you can take right now to begin orchestrating campaigns instead of continuing to send disparate communications.

1. Create a center of excellence.

I've worked with a number of retailers to enhance their orchestration capabilities, and we always start with the development of a center of excellence. We include stakeholders who represent the different departmental players, as well as leadership. The team develops governance processes that support overall business objectives and then enforces the decisions to ensure a better overall outcome.

Here's an example of how it worked for one customer. A clothing retailer used to send two emails a day to all its customers. Now, I don't care how loyal your customers are, but no one wants to read two emails a day from a retail store. Once I sat down with the marketing manager for this particular brand, the reasoning behind the mass messaging became all too clear. Internal customers—representing a wide variety of brands—demanded that the email team send their promotions to the entire database of customers several times a week to help them meet their sales goals. Compound this predicament with dozens of internal customers making the same demands, and you've got an email melee on your hands.

We saw open rates soar by simply reducing the number of emails from three a day to one a week based on relevant criteria that the customer had previously shown interest in.

Fortunately, there was an easy solution for this. I worked with the marketing manager to establish a center of excellence that set forth actual guidelines for email governance. As a result, we saw open rates soar by simply reducing the number of emails from two a day to one a week, based on what the customer had previously shown interest in.

Setting up a center of excellence can also give your brand a place to oversee and improve marketing campaigns. When establishing your center, remember that you need to create it on two levels—one as a steering committee, and another to oversee day-to-day governance. This will help your brand keep a keen eye on overall best practices that can be passed down to those in charge of daily oversight and implementation.

2. Obtain universal buy-in.

Very few digital marketing processes require the support from as many people as are involved in campaign orchestration. I always stress to customers that everyone needs to feel invested in the success of the project—from the executive who signs the check, all the way down to the database analyst who pulls lists and runs QC tests on customer IDs.

Think of all your campaigns as a long chain that is only as strong as the weakest link. All it takes is a single misstep in the process to create problems that impact the rest of the team downstream. When working toward harmonious integration between departments, the last thing you want is for a key player to say, "I don't see why we needed to change this. The old process was working just fine."

Mastering cross-channel personalization takes universal buy-in, plain and simple. A single break in the chain can bring your efforts to a halt, so make sure everyone involved is on board with the plans you've set forth for your next big project.

3. Document each step of the process.

A financial services company I worked with had a fantastic process involving business requirement documents (BRD) and functional requirement documents (FRD). Even better, was their attitude toward these two essential project guides—if it's not in the BRD or FRD, then it doesn't exist.

I advise all of my customers to take project documentation seriously. For example, a typical BRD for a social campaign would outline the entire process, along with the parameters that define it, such as timeframe, business objectives, and desired outcomes.

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Every aspect of your project needs to be included in these documents so that nothing is left to question. Your BRDs and FRDs should be so airtight that if the center of excellence disappeared tomorrow, another group could come in and take its place without missing a beat.

When creating documents to cover both functional and business requirements, write down in one place all the steps needed to schedule a campaign. Get on paper any federal and state compliance guidelines you must adhere to. No one involved in the process should be able to come back and say, "I had no idea we were doing that."

Leave no stone unturned and no topic undiscussed, and you'll be setting a smooth and steady tone for the duration of the process.

4. You have the technology. Now it's time to use it.

The tools needed to orchestrate great campaigns have grown more sophisticated over the years, enabling more analysis, more integration, and more insight than other platforms. The problem is that many brands aren't using the tools that are already available to them to improve marketing campaigns.

One example that comes to mind involves a customer stuck in the batch-and-blast mentality. The customer had a campaign platform, but was failing to use the data and intelligence it gathered. If they had used the data insights, they could have created and delivered targeted messages across the right medium, and at the right time.

The good news is that this particular brand was open to a messaging strategy overhaul. We went to work identifying KPIs that would enable us to predict and leverage the point at which customers were likely to repurchase certain items. We also focused on getting the timing right, making sure we reached out to customers on their schedule—not ours. KPIs were met at higher rates because we could dive into the data available to us through a central campaign-management platform, and apply the insights.

5. Know the marketer journey inside and out.

I've seen many customers adopt tools with the specific goal of reducing campaign time, and then realize, too late, that the technology only applies to the shortest step of their process. By mapping your marketing journey, you'll better understand exactly where your pain points and inefficiencies are. And then you can implement tools and processes to improve those specific areas of your campaigns.

Mapping the marketing journey also gives you a clear view of exactly what the process involves, long before implementation begins. You can solve for issues like governance and regulations that may hinder campaigns further down the road. And you can determine whether you'll be orchestrating campaigns across a single channel, or across all the marketing channels your organization employs.

While most companies have the same cautions and considerations regarding regulatory requirements, others operate in stricter industries. It's always smart to have a compliance team review communications. Additionally, an organization's size and level of sophistication will likely influence how much of the process is kept in-house versus farmed out to partners. These issues should be spotted well before campaigns begin, and a thorough understanding of the marketer journey will help you flag all of the potential roadblocks for smooth campaign orchestration.

With the right data management platform, you'll coordinate campaigns that are sure to be music to your customers' ears.

To learn from orchestration experts how to deploy seamless cross-channel campaigns that deliver the right messages in the right context, click the link below.

https://helpx.adobe.com/support/campaign.html

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