ONE-TO-ONE MARKETING

How to Add Personality to your
Customer Engagement Campaign

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EXECUTIVE SUMMARY

Companies are no longer controlling the conversations around their brand. Instead, customers are being influenced by external factors and deciding unilaterally when to interact with a company. In order to remain relevant, companies must put aside the traditional marketing funnel and embrace a customer-centric approach to engagement.

This requires an increased focus on customers over products, a personalized approach to communication, and greater accessibility. These changes will enable a company to build meaningful long-term relationships with loyal customers.

CREATING A PERSONALIZED CUSTOMER EXPERIENCE

Companies are failing their customers.

For far too many years, businesses have viewed their customers as a singular homogenous group, interacting with them at predetermined decision points - a.k.a. "touchpoints"[1]. Unfortunately, these touchpoints fail to appreciate the myriad ways in which a customer might interact with a brand.[2] For example, while a company might define a touchpoint as the marketing email they send, a customer may have ignored this and instead relied on the recommendation of an acquaintance.

> *...THE CRITICAL FLAW IN THE MARKETING FUNNEL IS THAT IT REQUIRES MARKETERS TO "PUSH" CUSTOMERS DOWN A LINEAR PATH.*

In fact, customers today are more likely to be influenced by external factors out of the company's control, such as recommendations from friends and influencers. Further, they are comfortable connecting with brands using their preferred channels and at times of their choosing. They are unlikely to be travelling down a linear path put in place by the brand.

Hence, a more sophisticated approach is necessary for companies to win the loyalty of their customers, dropping the anachronistic focus on collective interaction and instituting a more personalized engagement strategy[3].

THE LINEAR MARKETING FUNNEL NEEDS AN UPDATE

In 2007, Brian Haven argued that the traditional marketing funnel was a "broken metaphor that overlooked the complexity introduced by social media". As identified by Haven, the critical flaw in the marketing funnel is that it requires marketers to "push" customers down a linear path.

The traditional marketing or purchase funnel tracks customers from the "awareness" stage all the way down to the "consideration", "preference", "action", and "loyalty" stages (see figure 1)[4]. Although this is still applicable in some cases, it fails to take into consideration the individual needs of a customer who does not necessarily adhere to this standard definition.

AWARENESS

CONSIDERATION

PREFERENCE

PURCHASE

RETENTION

Figure 1

Since companies are no longer the guides down the funnel nor are they the ones controlling the conversations around a brand, solely tracking individual transactions within the funnel, instead of the whole buyer journey, limits a holistic appreciation of a customer's' actions. For example, a customer who doesn't buy much, but influences a large number of potential buyers, could be seen as a more valuable marketing investment.

The solution is to update the current concept of the marketing funnel. Instead of focussing on individual points of customer contact, businesses must start forming meaningful, ongoing relationship that involve frequent interaction with their customers[5]. This kind of interaction places the customer in the centre and makes continued engagement a key component.

A NEW MNEMONIC FOR PERSONALIZED MARKETING CAMPAIGNS

This shift towards personalization has been discussed at length by Don Peppers and Martha Rogers. They argue that Jerome McCarthy's "Four P's" of marketing - product, place, price, and promotion - are no longer relevant, as they are ill-equipped to create the personalized experiences required by customers today[6].

...CREATE CAMPAIGNS WHICH ARE ORIENTED AROUND THE CUSTOMER RATHER THAN THE PRODUCT.

Peppers and Rogers point out that companies using McCarthy's mnemonic end up creating product focused campaigns, which target all customers the same way within the aggregate market[7].

While the Four P's might have thrived in a world where competition was geographically limited and marketers had big, obedient audiences, today consumers are no longer beholden to a particular brand and are comfortable making their own consumption choices[8]. Hence in this new paradigm, it's necessary to create campaigns which are oriented around the customer rather than the product. To create such campaigns, Peppers and Rogers recommend an alternative mnemonic for personalized marketing - "The Five "I's":

IDENTIFICATION   INDIVIDUALIZATION   INTERACTION   INTEGRATION   INTEGRITY
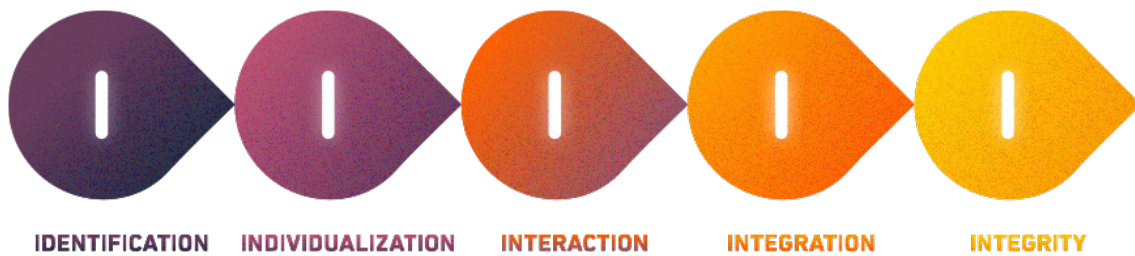
Figure 2

This mnemonic requires that companies (i) identify their customers, (ii) differentiate them by what they need and value, (iii) interact with them, (iv) customize their product or service to meet their individual needs, and (v) build a relationship based on trust and understanding[9]. In other words, companies must be prepared to actually communicate with their customers on an individual basis, rather than as a group, and treat them like a friend or colleague.

Furthermore, it's imperative that this form of "customer engagement" involves repeated interactions that strengthen the emotional, psychological or physical investment a customer has in a brand[10]. That is, a one-off marketing effort is not enough to capture and retain the attention of customers. Companies must look at their customers in a long term, more strategic context, rather than as a quick sale.

This is where one-to-one engagement starts to play a major role. Customers will be more interested in a brand, product or service if they are targeted individually rather than as a part of a larger group. Hence, a targeted, personalized campaign will be more appealing to customers[11].Further, once a company has captured the attention of its customers, it must work towards gaining their trust and loyalty by providing superior service and support.

Although Pepper and Rogers described this concept of personalized or "one-to-one" marketing at a time when digital marketing channels were still in their infancy, there's no doubt that the most successful companies of this generation have been able to firmly implement the "Five I's".

STEPS TO BUILD A PERSONALIZED RELATIONSHIP

Before going into details on the various tools and channels a company can use to communicate with their customers, it's important to take a look at how they can personalize interactions.

(1) IDENTIFY AND DIFFERENTIATE YOUR CUSTOMER BASE

The first step is to gain an understanding of the customer base in as much detail as possible[12]. This goes beyond the basic information the customer might normally provide (i.e. their name and address), and includes information such as their habits, behaviors and preferences. Next, a system must be created to easily collect all this information on a recurring schedule.

Once the customers have been broadly identified, they can be differentiated based on the type of engagement they are comfortable with or require, i.e. if they don't want any kind of interaction then they should not receive any. This will help tailor the company's behavior towards each customer in order to reflect that customer's needs.

Example. Marketing automation providers Hubspot recommend creating individual buyer personas for the different types of customers a company is likely to encounter[13]. Each persona represents a different slice of the target audience. For example, an airline could have the following buyer personas: a vacationing family, a corporate traveller, a young backpacker, and a honey-mooning couple. Depending on which personas the company is interacting with, the marketing voice and tone can be adjusted to fit their needs.

**(2) INTERACT AND
ENGAGE CUSTOMERS**

Once a customer has been thoroughly profiled, effective and efficient interaction can begin.

Efficient interaction requires the development and maintenance of a variety of customer support channels that are more cost effective than telephone or email. This can include creating a self-service portal, using social media, or communicating through live chat. A latter section explains this in greater detail.

On the other hand, **effective** interaction ensures that the information provided to customers is relevant, timely, and fits their needs. Effective interaction requires a number of different elements:

> • *Consistency.* Every interaction with a customer should be a continuation of previous conversations, i.e. it should pick up where the last one left off, irrespective of the medium, channel or agent.

> • *Cross Collaboration.* Customer engagement should not be siloed within a particular department. Interaction between teams is essential to ensure that the engagement is effective. It's vital, that no-one department dominates the conversation, be it marketing, sales, or customer support.

Example. Bianca Buckridee, VP of Social Media Operations for JPMorgan Chase, created a cross-disciplinary social media platform at Chase, so "customers can tweet one handle and get help for a litany of things. A retail account, a credit card, a mortgage, an auto loan, a student loan, investment questions." [14]

• **_Open engagement._** Instead of imposing terms onto customers, it is more effective to give customers a chance to describe their needs. Both the customer and the company bring something different to the table, creating a personalized and unique experience. Further, if the customer's needs are met and the product is tailored to them, the customer will be unable to find the same convenience with a competitor.

Example. _Anya Hindmarch, a handbag designer, lets her customers participate in the creation of her handbags. She has her customers provide personal photographs that are then transposed onto one of her branded bags. There is of course a hefty premium for these personalized bags, but it's a price customers are willing to pay as they derive greater value from it._[15]

• **_Special attention._** Not all customers require the same level of support and care. It is important to identify those individuals who need the most help and provide it in a timely manner. In some cases a tiered structure towards engagement can be adopted. For many companies, their most loyal customers will represent a disproportionately large portion of the revenue. Giving these individuals special attention can significantly impact overall engagement and conversion.

Example. _Matt Mickiewics, co-founder of 99designs, talks about how Apple issued him a partial refund after he failed to claim a discount. Many companies would have passed him around for weeks or simply refused, but Apple understood the value of a loyal, satisfied customer and instead issued a refund._ [16]

• **Personal touch.** Customers are used to big faceless organizations, so adding a bit of personality to interactions can work wonders. Creating a "personal shopping" experience where customers are presented with the options that best suit them, can significantly increase conversions.[17] Hence knowledgeable staff, who are able to provide tailored responses to customers are important.The traditional marketing or purchase funnel tracks customers from the "awareness" stage all the way down to the "consideration", "preference", "action", and "loyalty" stages (see figure 1). Although this is still applicable in some cases, it fails to take into consideration the individual needs of a customer who does not necessarily adhere to this standard definition.

Example. *Zappos is known for going above and beyond when providing service. One of their customer service agents spent a full 10 hours on the phone with a customer helping them out with a request.* [18] *Most companies might deem this a waste of time, but Zappos' culture is not just about the bottom-line. They have created an environment where their employers feel empowered to provide service that goes beyond what an ordinary business would do.*

CONCLUSION

Customers have become disenchanted with the prevailing advertising and marketing efforts. They dislike being duped, tricked, and misled. The traditional marketing funnel, which has fueled such behaviour, has become an anachronistic concept as all customers are being targeted with similar initiatives.

This is why marketing campaigns need to shift from focussing on the one-to-many advertising-based approach to a one-to-one, personalized, customer engagement model. Instead of reaching for the short term goals and constantly optimizing for higher profits, one-to-one marketing focuses on building a long-term relationship with the customer.

In fact, a few companies have come to realize that the "one-size fits all" marketing strategy is no longer appropriate for this savvier generation of customers and have made the "Five I's" a core tenet of their product philosophy.

The next step is for companies to build on their relationship with customers through continued engagement and open interactions.[19]

MEET CUSTOMERS WHERE THEY LIVE - FINDING THE RELEVANT CHANNELS FOR COMMUNICATION

Prior to the growth of social media and user generated content, customers were contented - and in some cases - limited to engaging companies in an unidirectional manner. That is, they would contact them with a query via email or telephone or receive marketing messages. However, in today's connected world, customer's have many more tools at hand to engage companies.

The increase in engagement channels has also made customers more demanding. They want greater flexibility, require real-time interactivity - as opposed to the more static "send request and wait" experience - and seek ways to get service as quickly as possible.[1]

> 🙶 ...IT'S NO LONGER ENOUGH TO MERELY PROVIDE SUPPORT, A COMPANY ALSO NEEDS TO BE APPROACHABLE AND AVAILABLE ON A VARIETY OF CHANNELS.

Richard Sedley identified that marketers were losing control of their brands and were increasingly developing engagement opportunities on other people's websites, i.e. social media platforms. He elucidated that the key principle was to "be where [your] audience is rather than always trying to drive traffic back to you".[2] Hence, it's no longer enough to merely provide support, a company also needs to be approachable and available on a variety of channels.

This section highlights the emerging engagement channels and demonstrates their effectiveness at customer support.

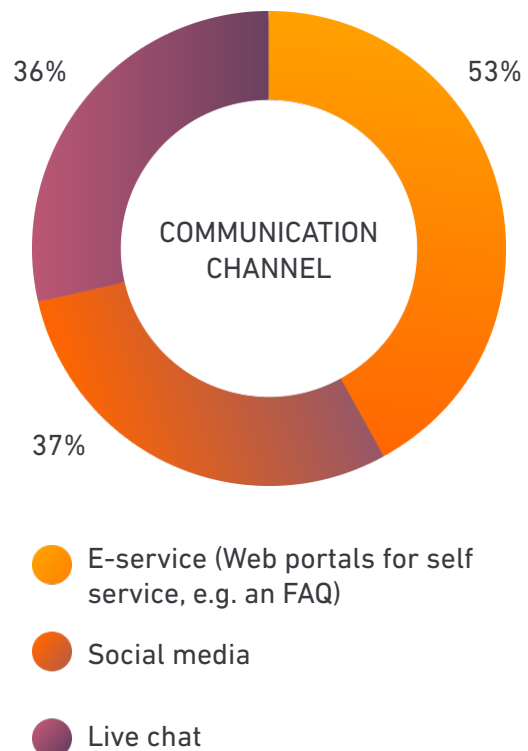# COMPANIES MUST BE PREPARED TO ENGAGE ON POPULAR CHANNELS

In recent years, companies have realized that providing customers with greater engagement opportunities can increase overall satisfaction and make their brands more appealing. Indeed, according to a recent report from the Aberdeen Group[3], 94% of organizations provide service and support across multiple channels (including, email, telephone, e-services, web queries, remote support, social media, live chat, mobile messaging and forums).

Since most organizations will not have the necessary resources to engage customers across all these channels, it is important to identify early on which are more valuable. This will be different for each company, however based on feedback, the Aberdeen Group found that e-service (web portals for self service, e.g. an FAQ- 53%), social media (37%), and live chat (36%) were becoming increasingly popular.

A   **E-SERVICE OR SELF HELP**

No two companies are the same, and neither are their customers. Although the importance of personalized service cannot be overstated, it is equally important to understand the preference of customers. In fact, studies have shown that an overwhelming 60% of customers hate waiting longer than a minute before receiving support.[4] Further, despite the importance of engagement, some customers would prefer to solve their problem themselves. Indeed, 91% of customers would prefer to use an online customer portal if it was tailored to their needs[5] and 72% would prefer to resolve their problems before contacting the company.[6]

36%   53%

COMMUNICATION CHANNEL

37%

- E-service (Web portals for self service, e.g. an FAQ)
- Social media
- Live chat

These staggering numbers suggest that providing self-help is virtually mandatory to most businesses. But, this seems to be in stark contrast to the notion that companies must be constantly engaging with their customers.

The appeal of continuous engagement for a customer is that they can have their questions answered at all hours of the day. Depending on the size and scale of a business this is sometimes not practical. Customer engagement does not always require constant direct contact between a customer and company. Indeed, this can be difficult and an effective method of bridging the gaps when no-one is available, is to have a robust self-help portal.

Not only can self-service be a cost-saver[7], it is also a preferred engagement channel for your customers.

Creating a website that can engage and support customers without any manual input requires the following elements:

- *Product information.* The product(s) or service(s) being sold must be clearly identified with a list of its features, benefits, and pricing information. The more information that is provided the less questions a customer will have.

- *FAQs.* Most organizations receive the same set of questions over and over again. Instead of replying to each one individually, creating a "frequently asked questions" section will enable customers to find the answers for themselves.

- *Forums.* Depending on a company's' size, there may be customers who have been using the product or service for many years. Newer customers can then use these forums to interact with their more experienced counterparts. Not only does it lessen the burden on the organization's own support staff, the forum also helps foster a community around the product or service.

- *Alternative channels.* Yes, alternative channels are still important. Providing alternative channels on an easily accessible "contact" page, for customers with additional queries. Additional channels can include telephone, social, live chat, and email.

Example. By using a walkthrough creation tool "WalkMe", SohoOS.com managed to save 50% on support costs and increase user engagement by 10%. It is not necessary for the company to build its own platform.[8]

Example. The municipality of Eskilstuna in Sweden is a great example of how a small community effectively used self-service portals to train users on a new system.[9] In 2009 they launched the "Training Portal" which let users find answers 24 hours a day and allowed them to learn the new system before it went live. The editors created numerous guides and tutorials on the Training Portal. They then heavily marketed the Training Portal and its guides - using ads and emails - to inform new users. Crucially, the municipality followed up by analysing which pieces of content were receiving the most views and which weren't doing so well. They also looked at user feedback and comments. With these two metrics they were able to add new guides and edit existing one.

(B) SOCIAL MEDIA

The drumbeat of social media is unavoidable. Zopim's own experience with creating a community of engaged followers[10] is a testament to the impact even a small business can have in a space dominated by "influencers" like Justin Bieber.

Similarly the overall growth of social media, particularly Twitter and Facebook, has been impressive. In terms of Monthly Active Users ("MAUs") Facebook has grown nearly 17% between Q3 2012 and Q3 2013 and during the same period Twitter has grown a startling 44%. However, of even greater significance is the fact that overall engagement on these networks has outpaced their growth - by a factor of nine. [11]

" *SUCCESSFUL ENGAGEMENT CAN DRIVE POSITIVE BRAND ENGAGEMENT, CONVERSATIONS, AND LOYALTY, WHILE NEGATIVE EXPERIENCES CAN DEVALUE ALL OF THE ABOVE.*

The increased engagement and bidirectional nature of social media make it ideally suited to delivering on the promise of one-to-one marketing and the "Five I's" in a cost-effective manner. Further, successful engagement can drive positive brand engagement, conversations, and loyalty, while negative experiences can devalue all of the above. However, to succeed on social it is important to build a personality by which customers can be engaged in genuine conversation. It's offensive and rude to blast promotional messages and canned responses all day long. Brands should strive to show off their personality and expertise with personalized responses and relevant information.

The following steps must be put in place before embarking on social media engagement[12]:

- **One team.** First, companies must stop siloing social media as either "marketing" or "customer service". In most cases, both roles are fulfilled by the social staff. Further, customers should not feel as though they are dealing with different departments each time they have a query.

- **Strategy.** Just like any other channel, it is vital to put in place an outline or strategy of what social is supposed to achieve. Creating a strategy that spans the entire company is essential to successful social media engagement. This strategy will be especially useful when faced with a brand or PR crisis.

- **Personality.** Create a unique voice for the brand. Social media is informal in nature, do not get caught being overly formal or corporate. Instead create a unique identity and personality for the account.[13]

• *Timeliness.* Most companies don't have the resources to provide support 24/7 and it is fine to create a schedule or even have "off-days". However, customers treat social media as real-time communication. Hence, if a business can impress them with immediate answers, they will become loyal to it and remember it the next time they want to make a purchase.

• *Empower agents.* Ensure the social media staff have the ability to make decisions and provide actual resolutions. There is nothing worse than being shifted from one department to another, none of which can solve the underlying problem.

• *Be proactive.* Identify appropriate situations where staff can integrate themselves into the conversation. Customers appreciate being heard, even if they don't actively solicit it.

• *Feedback.* Engagement must be bidirectional and so if a customer shares their feedback it must be taken into consideration. In the event the feedback is negative, ensure a solution is provided and the customer is looked after.

• *Analysis.* As with any digital channel, social media channels are filled with incredible data repositories. Analyzing this data help the company gain understanding of its customer base. Unfortunately, 83% of companies don't bother to analyze their social media demographics.

Despite its obvious advantages, companies are still skeptical of the value of social engagement.[14] Further, many feel that they lack the necessary resources and technology to implement it. In a survey conducted in 2012, only 41% of companies indicated that their service organizations were using social channels for engagement. It is important to remember that good or bad performance on social media can impact the bottom line. So it is important to put in the effort and get it right.[15]

Example. *Not every company needs to spend millions of dollars or have a dedicated social media team. Jen Grossman, owner of Toronto-based bakery Irresistibly Delicious, is able to reach her regular customers through marketing her newest creations on Facebook.[16] Her goal is to attract new customers and entice the regular customers to make a purchase.[17]*

Example. *Taco Bell, the American fast food chain, were unsatisfied with their large (7 million+) following on Facebook. They were uninterested in simply growing their following, rather they wanted to create a platform for storytelling and engaging stakeholders.[18] Instead of focussing on quantifiable numbers (such as "Likes", shares, and fans), they were interested in the quality of conversations and interactions with customers.*

To achieve their goals, Taco Bell had three main tactics:
- *Sharing authentic content,*
- *Rewarding passionate fans, and*
- *Participating in conversations.*

Their new direction and tactics were a great success. They increased their fanbase by 3 million users, grew the average number of yearly conversations and topped Digital CoCo's Restaurant Social Media Index (beating McDonalds).

(C) LIVE CHAT

> **44% OF RESPONDENTS SAID THAT HAVING A LIVE PERSON ANSWER THEIR QUESTIONS WHILE THEY WERE IN THE MIDDLE OF AN ONLINE PURCHASE WAS ONE OF THE MOST IMPORTANT FEATURES A WEBSITE COULD OFFER.**

According to numerous reports, live chat is an increasingly important and profitable customer engagement platform.[19] In fact, in a survey conducted by Forrester, 44% of respondents said that having a live person answer their questions while they were in the middle of an online purchase was one of the most important features a website could offer.[20] Since then, this number has only increased.[21]

Considering call centers are the dominant form of customer engagement, it's no surprise that live chat, offering the same one-to-one real time connectivity, is popular amongst a variety of companies.[22] However despite its similarity to call centers, live chat has its own unique set of benefits:

- *Customer focused.* As identified above, companies are implementing live chat because customers are finding this channel incredible useful. Indeed unlike other engagement channels, live chat enables customers to continue browsing a website even while talking to an agent.

  Further, live chat is far quicker and, because customer service agents can deal with multiple conversations at once, the wait times are a lot less as well.[23]

  Just as e-service portals benefit the customer, so too does a live chat experience.

- *Personalized experience.* Live chat can help businesses create a personalized experience in two ways:

First, it enables companies to obtain information a wide variety of information about a customer, including their location, names, social profiles and whether they are a returning visitor or not. This will allow support staff to refer to visitors by their name, showing familiarity and a personalized approach.

Second, most live chat providers also allow monitoring the pages a visitor has been on. This can be used to determine why they are on the site and/or what their problems are. For example, if the visitor is on the checkout page for a long time they might be having a problem making a payment. A chat agent can then initiate a conversation tailored to their specific needs.

Third, businesses can look at historical chat data to determine the customer's earlier problems. One of the key points Peppers and Rogers makes is that each interaction with a customer should further the relationship. That is, it is a complete waste to have a long conversation with a customer only for it to be forgotten the next time the customer wants help. Hence, live chat's transcription mechanisms ensure that businesses can quickly refer to the customer's history and carry on the conversation.

• *Proactive chat.* Although most conventional live chat is conducted reactively, i.e. support staff interacting with customers after the latter have initiated contact, proactive chat - where the chat service initiates contact - has become increasingly popular. In fact, by 2012, 66% of customers had been proactively invited to a chat. And of these, 94% were somewhat satisfied or very satisfied with their experience.[24]

Proactive chat is an important part of engagement as it enables the companies to target specific customers with personalized information. For example, if a customer is on a website that sells an unique pair of shoes, that same customer might be interested in the matching belt. This is exactly the kind of personalization Peppers and Rodgers find valuable for one-to-one marketing.

However, it is possible to get proactive chat wrong, approximately 20% of customers who had received an invitation ended up leaving the website due to poor communication.[25] Hence, it is equally important that the company target its messaging appropriately.

Example. *The Grasselli Library at the John Carroll University discovered that proactive chat increased engagement through this platform by 600%.[26] Having the chat service promote itself to customers was an effective method of attracting interaction, far more than merely leaving it as an alternative option.*

Example. *Smart Furniture managed to increase conversions by an average of 20% month-over-month after adding live chat to their website.[27]*

Example. *David's Bridal realized that buying a wedding dress online was an expensive and emotional decision, with customers (i.e. brides-to-be) unwilling to commit to making a purchase. In most cases they would have questions about the dress, such as its fit, color, accessories, as well as questions about their return and shipping policies. That's why many of them would place their dream dress in the shopping cart but wouldn't checkout. David's Bridal recognized that answering questions in real time and helping shoppers with their decision-making would increase their comfort levels and boost conversions. So, their solution was to hire highly knowledgeable and specially trained specialists to help their customers over live chat. Since launching this new support channel, David's Bridal observed a 50% improvement in conversion rate.[28]*

CONCLUSION

One of the points elucidated by Peppers and Rogers, and illustrated throughout this paper is that the needs of the customer are of the highest importance and a company must evolve to meet these needs. Hence, picking the appropriate engagement channels depends largely on the preferences of the customer.[29]

Many prefer to obtain information and support themselves and an e-service portal is suitable. However, others appreciate constant engagement and connectivity, and for those live chat and to some extent social media are viable options.

Whichever channels are used, "the foremost rule for offering multi-channel support is consistency. Customers should see absolutely no difference in messaging from one channel to the other".[30] It's not easy to create such an experience that lasts 24 hours a day and 7 days a week. However, the company that does achieve it will have a competitive advantage and customer loyalty.

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ABOUT ZOPIM

Zopim's award-winning live chat solution helps businesses increase sales conversion by engaging important leads on their websites. Zopim can be used to monitor and chat with visitors in real-time, making e-commerce easy and effective for a wide range of businesses. Advanced features, such as Triggers, Departments, and File Sending allow businesses to provide support to customers effortlessly. With thousands of customers using Zopim daily, it has become one of the leading providers in its space.

For more information or to start a free 14-day trial, visit www.Zopim.com.

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