

Course 4 – Dcode Masterclass

# Mapping the Customer Journey through Attribution

By Phil Irvine

VP Audience Intelligence [@RPA](#)

# Agenda

**01**

## People Based Marketing

Many organizations operate in a manner to optimize channel based activities. With the increased complexity to reach customers across devices and channels, it is imperative to take a People Based approach.

**02**

## Developing a Customer Map

Most organizations are aware of the importance of building a 360 degree view of the customer. We'll walk through an approach to accomplish as well as how to think about activating against this intel.

**03**

## Establishing a Customer Journey

Sales are typically the desired action from customers, but there are stages that need to be considered to meet that ultimate goal. Establishing a customer journey is imperative to understanding what your customers need at each stage to build relationships.

**04**

## Creating a Tracking Plan

Building a customer journey is just the starting points. Taking the time to establish key performance indicators (KPIs) at each stage leads to more efficient use of media and engagement activities to drive desired behaviors.

# Phil Irvine

## *Direct to Consumer Marketing Leader*

Phil is a marketing executive with vast experience from a brand and agency perspective with responsibilities managing direct to consumer programs with an emphasis on driving audience and customer centric focus at scale. Phil also has a track record managing marketing, operations, and customer experience activities geared to driving efficient growth for eCommerce and streaming businesses. Phil has also been a keynote speaker representing various organizations at digital marketing conferences to exhibit thought leadership in the space.

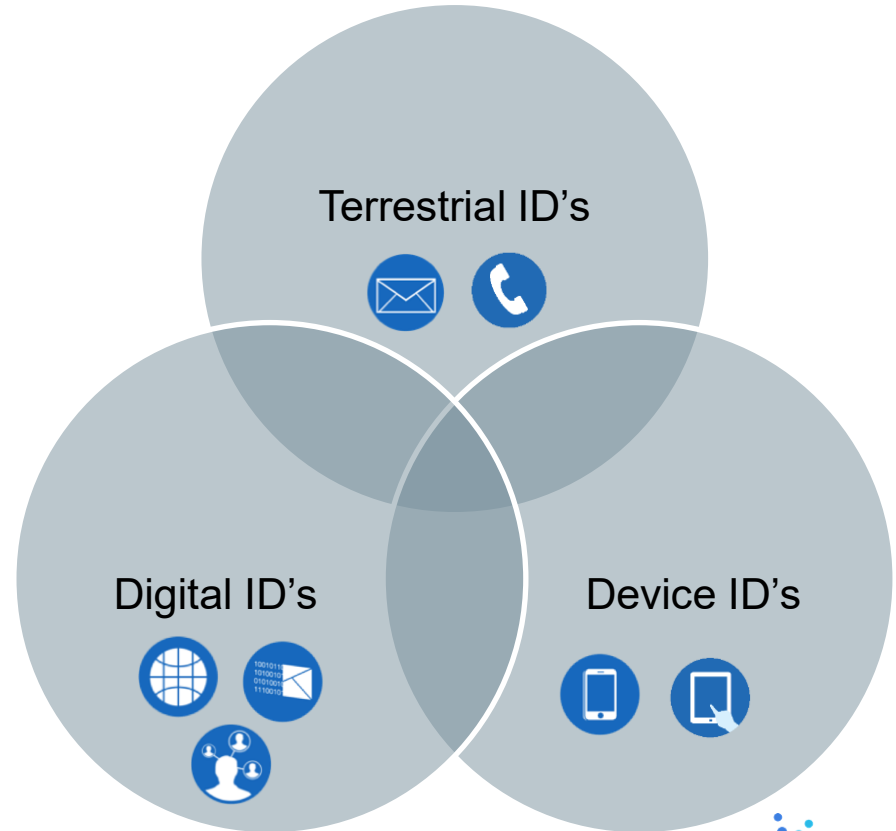
Phil has experience with building and overseeing teams managing digital marketing strategy and operations including support for performance marketing, creative, and analytics. Currently Phil is responsible for leading RPA's Audience Intelligence practice inclusive of developing holistic audience strategies to activate against all client media campaigns. The group is also responsible for developing audience profile intelligence to inform strategic planning activities as well.



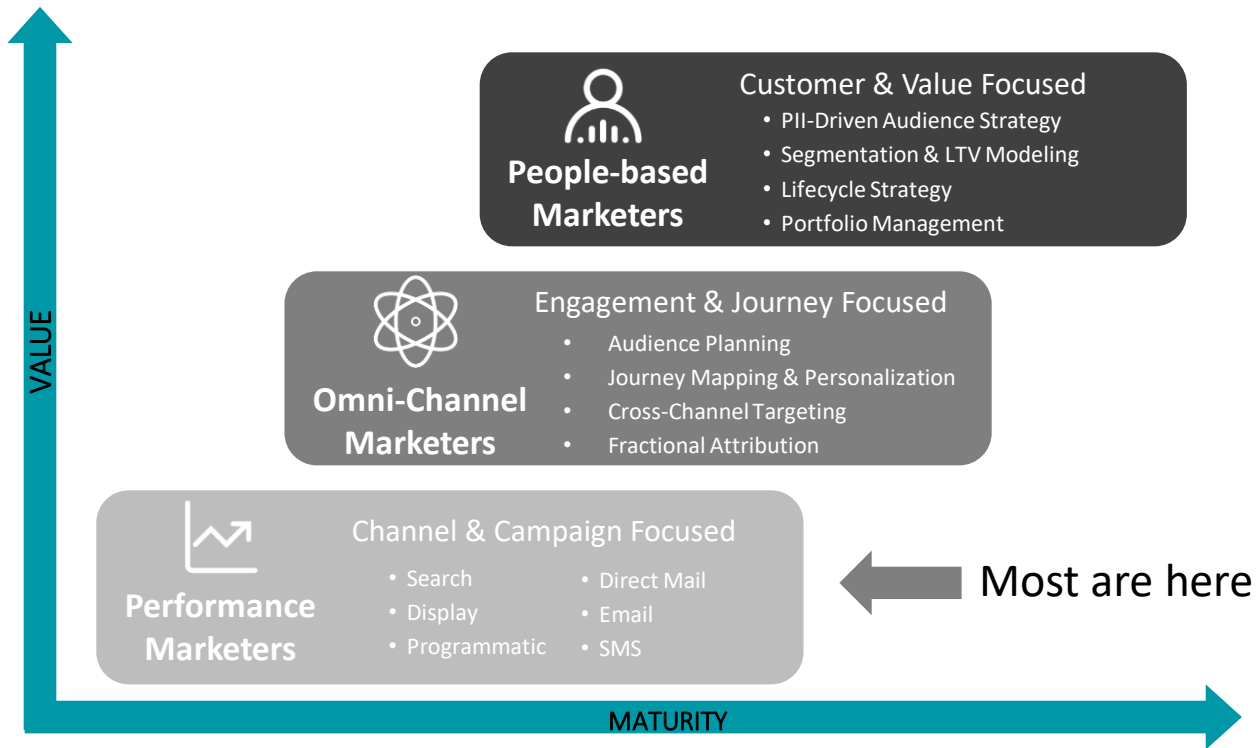
# People Based Marketing



# Current Challenges With Marketing To Individuals



# Transitioning from Performance Marketing to People Based Marketing



# Benefits of a People Based Approach



**Customer centered**



**Deliver relevant, integrated marketing communications**



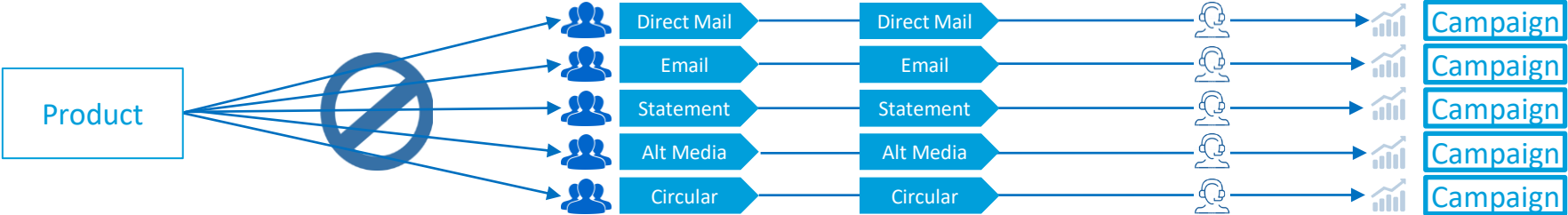
**Optimize marketing spend and improve program outcomes**



**Comprehensive measurement for insights and optimization**

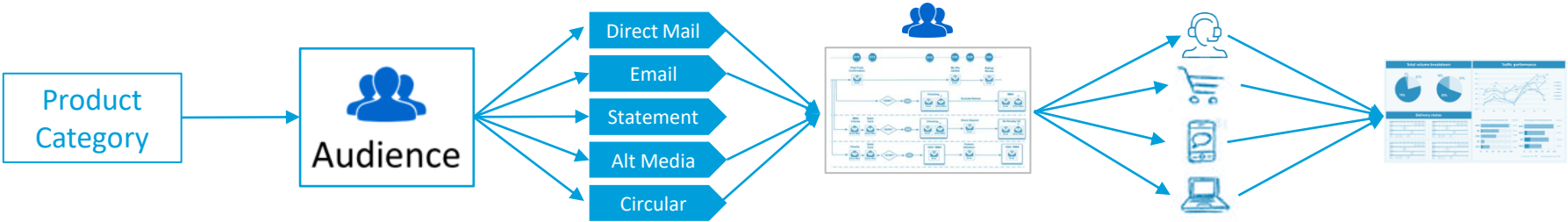
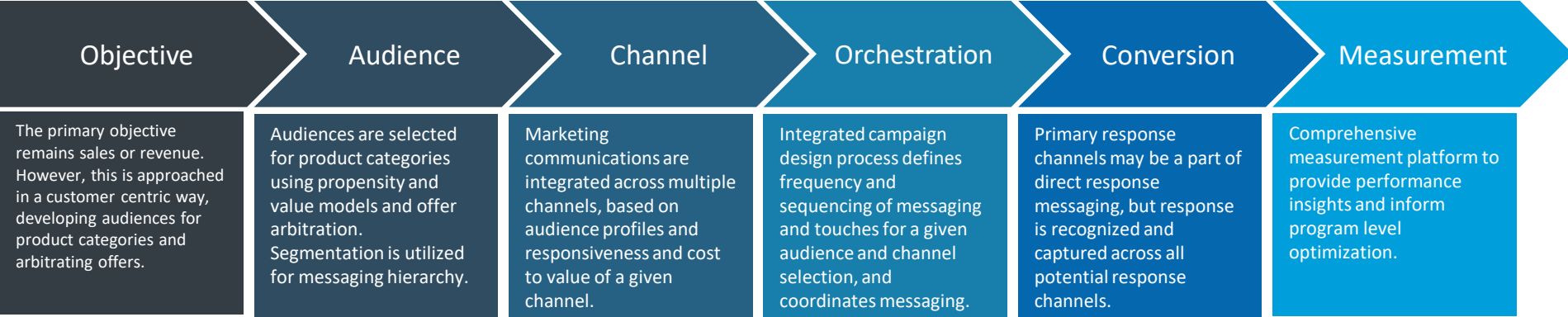
# Sample Siloed Performance Marketing Approach

Objective	Audience	Channel	Orchestration	Conversion	Measurement
Product sales volume/revenue	There is no inherent audience selection. Product goals are distributed to channels, and audience is selected within channel by cost and responsiveness.	Targets and budgets are set for each channel individually. Targeting is then based upon channel level cost and response curves.	Campaigns are uncoordinated across channels, without regard for overlap of communications. Optimization may only happen within channel.	Conversion is only tracked and measured in the primary response channel.	Only campaign level measurement. Lacking incremental and cross-channel measurement to understand the full impact and inform efficient allocation of spend.





# Future Integrated Marketing Approach



# Developing a Customer Map

## Identity



### Account & Behavioral Data

Current mailable customer  
Current Household product registrations: 3  
Tenure: 8 years  
App download: March 24, 2013  
App usage: Low  
Email Clicks L12 mos: 3 clicks  
Email Opens L12 mos: 5 opens  
Days since last click: 8 days  
Opens per month (L12): 0.9 opens per month  
Site Visits L3 mos: 2  
Site Visits L12 mos: 2  
Last engaged page category: Skate  
Most frequent engaged page category: Shoes  
Last Call: 10/1/2017  
Last Call Disposition: Warranty inquiry

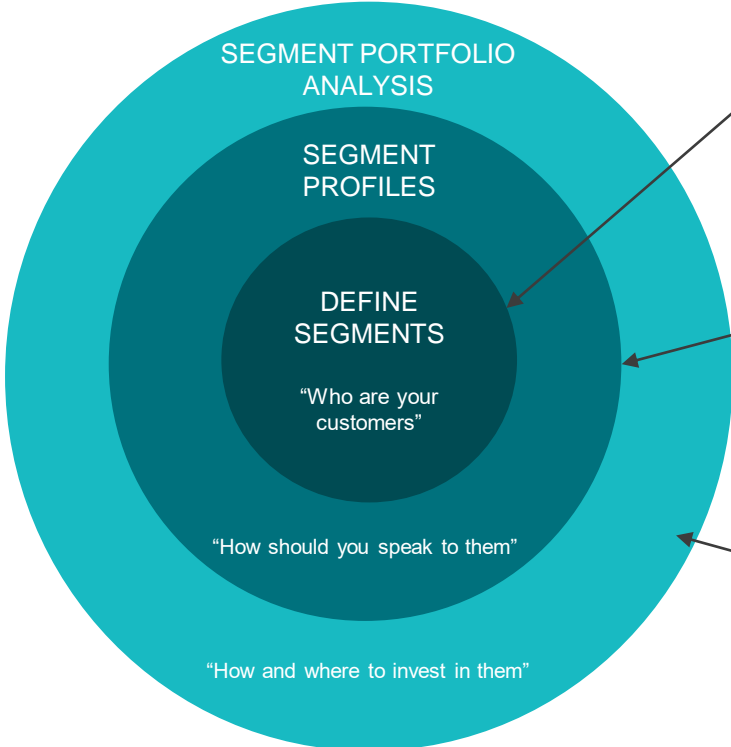
### Demographic Data

Age: 22  
Gender: Male  
DMA: Salt Lake City  
Spending Velocity: 5 = Med  
Homeowner: No  
Children: No  
Marital Status: Single

### Predicted | Segment Data

Segment: Engaged Clicker  
Appliance Status: Active  
Product Propensity Segment: Men's Shoes  
Life Stage Change: no  
Predicted LTV (value) category: High  
Predicted Churn Risk: Medium

# Approach to Building a Unified Customer View



**Cluster Segmentation Approach**

To develop segments, conduct a statistical exercise to group consumers into clusters, maximizing the similarities within a group and the differences between groups. Then the profiles of the groups were then summarized based upon those similarities and differences.

### Segment Definitions

Define unique customer cohorts based on the merging of 1<sup>st</sup>/2<sup>nd</sup>/3<sup>rd</sup> party data. Common dimensions to analyze include demographic, life stage, lifestyle, and motivational similarities

### Segment Profiles

Expand upon defined segments to map out key components to inform creative and messaging personalization

**Segment Value & Relative Opportunity**

### Analyzing Customer Portfolio

Further analysis of segments to understand market opportunities and propensities to transact. Some assets to consider include past transactional history, survey responses, and marketing engagement history

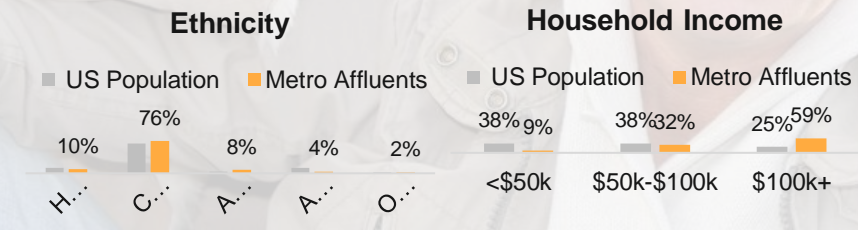
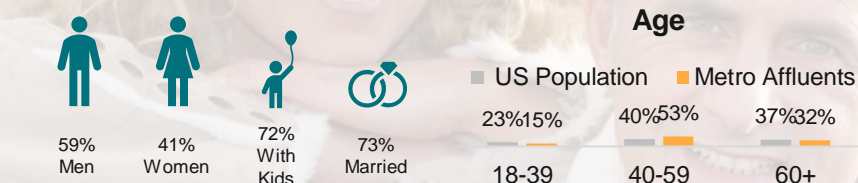
# Sample Segment Profile



Metro Affluents reside in larger, **wealthy metropolitan areas** and are highly educated. They have the **highest income** of any segment and enjoy traveling.

Most are married and half have children at home. They are **heavy tech users** and more likely to have smart home devices. They are also big **sports fans** and more apt to watch the **NFL and HBO**.

## DEMOGRAPHICS



## VIDEO



**When Selling Video...**  
Talk sports, comedy, and premium packages.

**Top TV Genres**  
Sports (26%)  
News (15%)  
Home/Garden (12%)



**More Apt To Be...**  
Recording TV programs and streaming video content

**Top Movie Genres**  
Comedies (10%)

## WIRELESS



**When Selling Wireless...**  
Focus on the latest premium devices and access to sports content.

iPhone (45%)

Navigation Apps (20%)

**More Apt To Be...**  
Purchasing the latest mobile device and relying on it for everything.

## INTERNET



**When Selling Internet...**  
Focus on connected/smart home use cases and premium speed.

32%

32%

31%

29%

**More Apt To Be...**  
Using wifi to connect with smart home devices.



Price Conscious



Quality Conscious

*I often pay more for good quality (52%)*

# Sample Customer Experiences



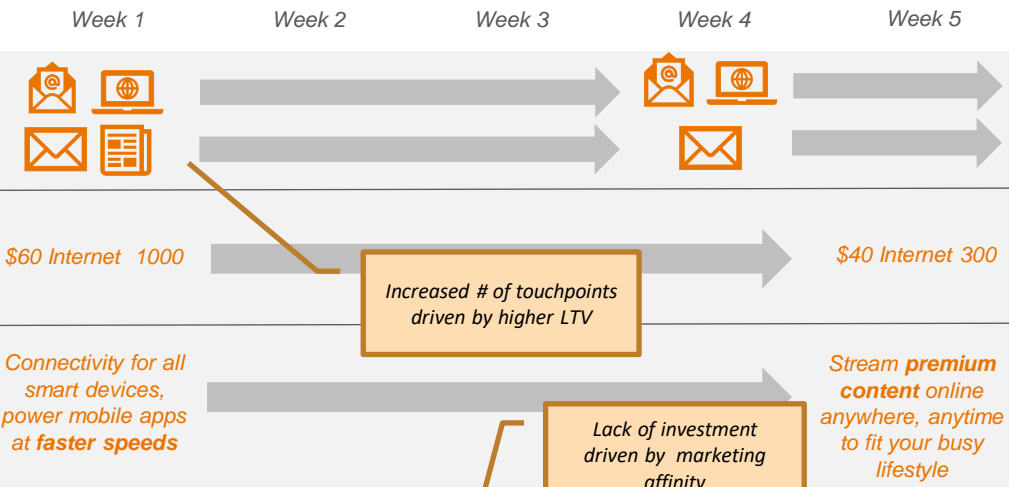
**Metro Affluents**  
**Current Product:** WLS  
**Product Propensity:** Fiber IPBB  
**Price Elasticity:** Low  
**LTV:** \$3,000  
**Marketing Affinity:** Email, Digital, Direct Mail

Online Tactics

Offline Tactics

Offer

Messaging



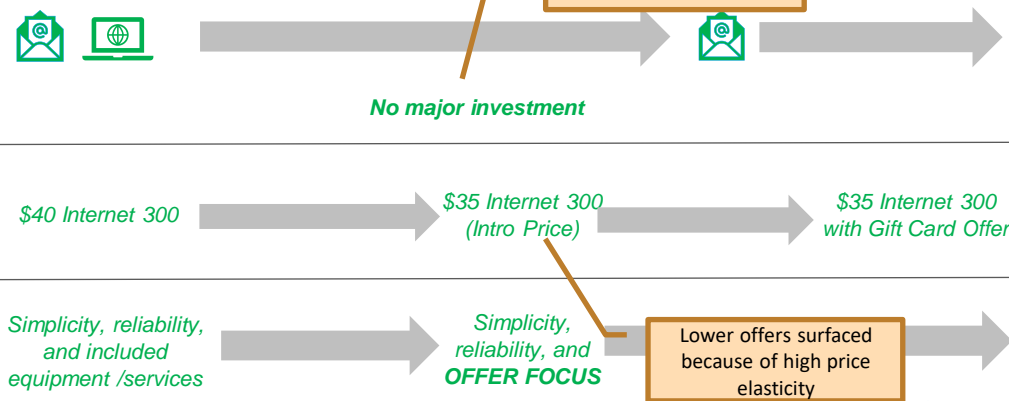
**Getting By**  
**Current Product:** DTV  
**Product Propensity:** Fiber IPBB  
**Price Elasticity:** High  
**LTV:** \$1,800  
**Marketing Affinity:** Email, Digital

Online Tactics

Offline Tactics

Offer

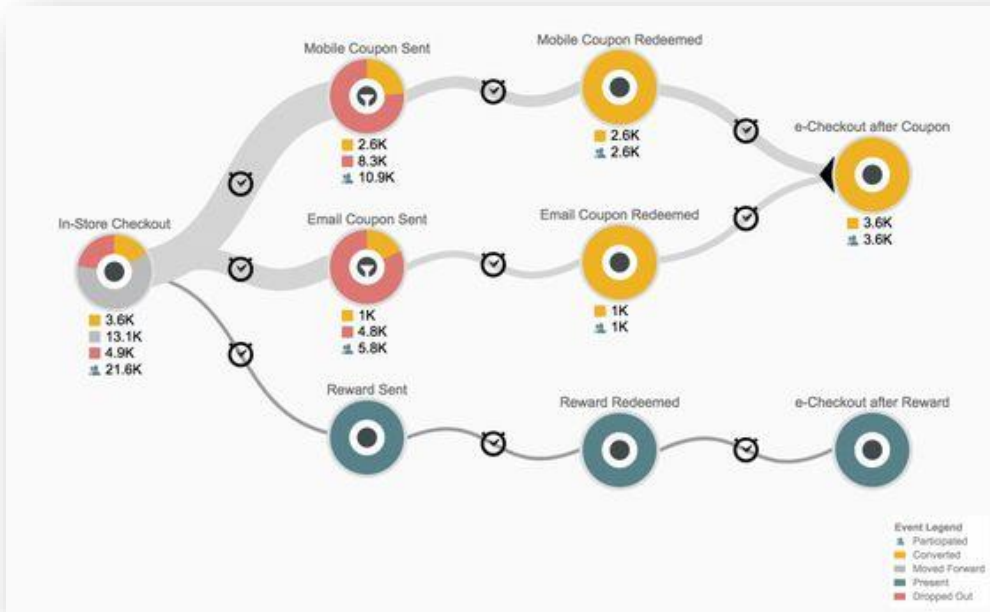
Messaging



# Establishing a Customer Journey



# Mapping Out Use Cases to Inform Customer Journey



Customer journeys aren't singular in nature, multiple paths can be taken to achieve business outcomes

# Sample Approach

---





# Use Case: Driving a Completed Application



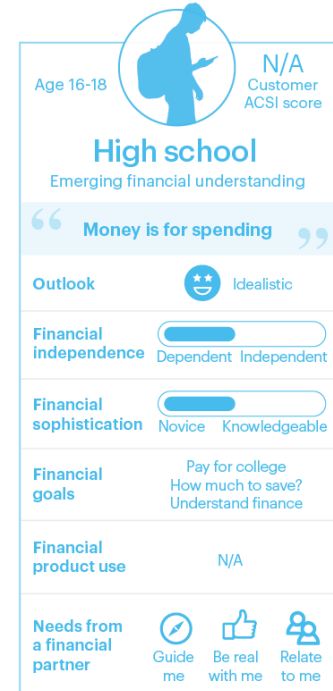
## Description

This use case shows the experience of application abandoners and illustrates an enhanced journey to re-engage these prospects and drive application completions

## Business Impact(s)

This use case would increase the % of application completions from app abandoners and application revenue

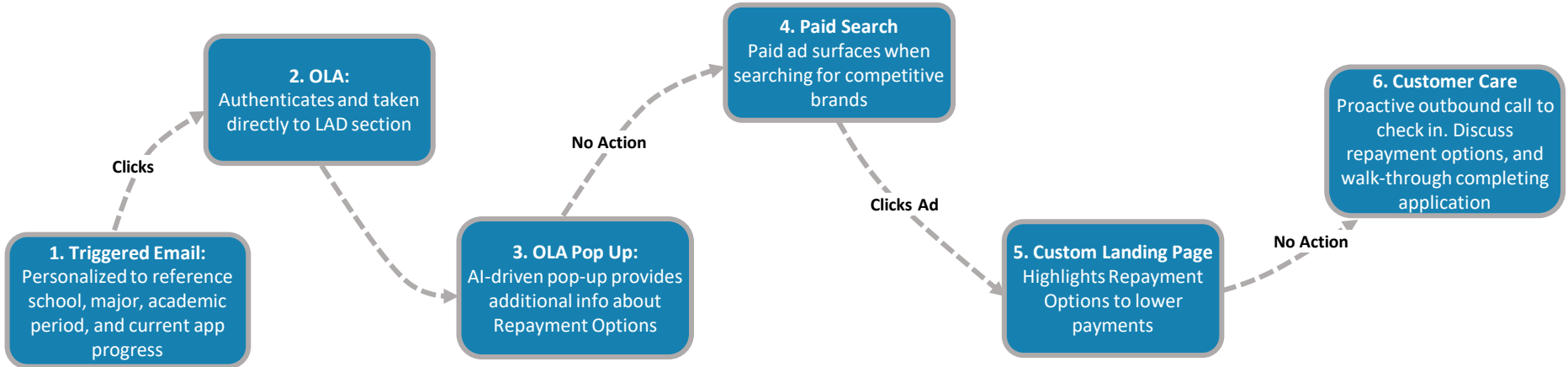
### Segment Focus



# Use Case: Driving a Completed Application



Ella is an 18-year-old senior in high school and has been accepted at Denison University. Her parents are financially secure, but don't have enough saved to pay for a private college. She started an application with a cosigner after receiving an email as part of a dip campaign. She abandoned when reaching the Loan Approval Disclosure (LAD) section after submitting her application. She has been verified already as being a student and has demonstrated signals that **prefers call center interaction based on previous general inquiry calls**. She also is prone to comparison shop before deciding.



# Use Case: Driving a Completed Application

		LAD DROPOFF	RELATIONSHIP BUILDING	SERVICE INTERACTIONS	FINANCIAL COUNTER
GOAL	MARKETING GOALS	This use case addresses customers who have started but not completed their application. The goal here is increase application pull through by helping customers confidently navigate through and complete their applications.			
EXPERIENCE (Desired future state experience)	CUSTOMER/PROSPECT INTERACTION	Steps 1 & 2 Ella is targeted with a triggered email based on her previous application abandonment at LAD stage.  Ella clicks on the email, lands back on her application.	Step 3 After Ella shows "exit" scrolling behavior application at the LAD section for the second time, a pop-up surfaces to provide more information to her.  She views the pop-up for 2 minutes before closing the pop-up and page.	Steps 4 & 5 Ella is targeted with a paid search ad while browsing for information about Citizens. She is targeted with a custom ad because of being a previous abandoner.  Ella clicks a Sallie Mae ad and is taken to a custom landing page.	Step 6 After not taking an action, two days later a customer care agent calls Ella to check in.  The agent leads the discussion with offering to explain more information about Chegg Benefits. The agent
	MARKETING EXPERIENCE	The triggered email is personalized to reference her in-progress application to Denison University, including loan terms. It would also personalize her anticipated major and school start date. Lastly, it would include words of encouragement to motivate her to progress with the application.  When Ella clicks to verify she is a student, she is taken to her application. After she authenticates, she is landed back at the Loan Application Disclosure section.	This overlay would be AI-driven and triggered based off of scrolling behavior and multiple abandon actions at the same step in the application process.  The overlay would speak to Ella as a student based on previous verification. It would surface Chegg Benefits included with a private student loan (4 Months Free Study Support) and also highlight repayment options (lower interest rate with low payments while in school).	The paid search ad copy would include study and homework support (reference to Chegg), no penalties for early repayment, and getting a loan without a co-signer within the description text in the ad  After clicking the ad, the landing page would highlight Chegg benefits and repayment options with benefits oriented specific to students. Rates would still be included but showcased lower in the fold on the page.	The proactive call would be predicated by Ella's signals of showing the call center as a channel preference, and her lack of application activity from previous contacts. The call would be initiated to her at a Household level.  The agent would lead with offering information about Chegg benefits. As Ella becomes more comfortable with the application process, the agent would offer to guide her through accepting her Loan Application Disclosure terms. The agent then completes the
	CHANNEL(S)	EMAIL; Online App System		PAID SEARCH; LANDING PAGE	
	DESIRED BUSINESS OUTCOME	Customer opens and clicks on marketing communication to navigate back to application specifically where drop off occurred with hopes to complete the application.		The goal here is to continue to stay top of mind for the customer when researching competitor rates by aggressively surfacing the paid search ad. When clicking through and navigating to the landing page it would further highlight benefits to get over the hurdle of financial payments	The goal here would be to personalize the initial contact with the customer by highlighting talking points based on clickstream behaviors. Then the intent is for the agent to walk the customer through completing the LAD terms while on the phone to finish the application
	KPIs	Email Open Rate Email Click Rate LAD acceptance		Time on site (viewing pop-up)	NAR Keyword Performance CPT Ad Click Rates Time on site (custom landing page)

This is a more detailed explanation illustrated desired interaction with the experience

KPIs established can help inform measurement plans for each stage

# Creating a Tracking Plan



# Cruise Industry Challenge

- Decimated by the COVID-19 pandemic
- Large operating costs
- Uncertainty of building up demand post pandemic
- Evolution from direct marketing to digital and people-based marketing



# Use Case: Driving a Cruise Booking

## AWARENESS

- Build reach about the brand
- Prospecting new, valuable audiences
- Drive traffic to cruise pages

Visits to homepage

## EXPLORE

- Drive research actions to cruise pages
- Drive video views of brand, Cruise Itineraries and Destinations

- TV Content
- Reviews
- FAQs
- Filmography
- Recommended Reading
- Passport & Visa Information

## RESEARCH

- Engage with consumers who exhibit in-market shopping signals
- Drive traffic to trip research-related pages
- Drive video views of brand, Cruise Itineraries and Destinations

- Learn More
- Itinerary
- Dates & Pricing
- Resources
- Read More
- Excursion Videos

## LEAD

- Re-targeting consumers who have engaged digitally or via call center
- Showcase best deals
- Drive request for quotes

- Free Brochure
- Newsletter Group
- Contact Us
- Best Deals
- Request a Quote
- Book Now (Start)

## BOOKING

- Re-targeting consumers who have engaged digitally or via call center
- Drive bookings and high-priority trips

- Booked Trips

Description

KPIs

# Use Case: Driving a Cruise Booking



- Build reach about the brand
- Prospecting new, valuable audiences
- Drive traffic to River, Ocean, and Expedition cruise pages

- Drive research actions to River, Ocean, and Expedition cruise pages
- Drive video views of brand, Cruise Itineraries and Destinations

- Engage with consumers who exhibit in-market shopping signals
- Drive traffic to trip research-related pages
- Drive video views of brand, Cruise Itineraries and Destinations

- Re-targeting consumers who have engaged digitally or via call center
- Showcase best deals
- Drive request for quotes

- Re-targeting consumers who have engaged digitally or via call center
- Drive bookings and high-priority trips

	AWARENESS	EXPLORE	RESEARCH	LEAD	BOOKING
<b>AUDIENCE SOURCES</b>	1PD				
	3PD				
<b>CHANNELS</b>					
<b>MEASUREMENT</b>	KPI				

# Use Case: Driving a Cruise Booking

	AWARENESS	EXPLORE	RESEARCH	LEAD	BOOKING	
	<ul style="list-style-type: none"> <li>Build targeted reach for brand</li> <li>Prospecting new, valuable audiences</li> <li>Drive traffic to River, Ocean, and Expedition cruise pages</li> </ul>	<ul style="list-style-type: none"> <li>Drive video views of brand, Cruise Itineraries and Destinations</li> </ul>	<ul style="list-style-type: none"> <li>Drive traffic to trip research-related pages</li> </ul>	<ul style="list-style-type: none"> <li>Re-targeting consumers who have researched digitally or via call center</li> <li>Showcase best deals</li> <li>Drive request a quotes</li> </ul>	<ul style="list-style-type: none"> <li>Re-targeting consumers who have filled out a lead but have not booked</li> <li>Drive bookings and high-priority trips</li> </ul>	
AUDIENCE SOURCES	1PD	<ul style="list-style-type: none"> <li>Website Visits</li> </ul>	<ul style="list-style-type: none"> <li>CRM</li> <li>Explore Phase Actions</li> <li>TV Content</li> <li>Reviews</li> <li>360 Ship Tour</li> </ul>	<ul style="list-style-type: none"> <li>Research Phase Actions</li> <li>Brochure</li> <li>Newsletter</li> <li>Contact Us</li> </ul>	<ul style="list-style-type: none"> <li>Leads</li> </ul>	
	3PD	<ul style="list-style-type: none"> <li>Age 55+/HHI \$100K+/International travel preference <i>(Defined strategic target)</i></li> </ul>	<ul style="list-style-type: none"> <li>Cruise Intenders</li> <li>Look-alikes of past customers via eCRM</li> </ul>	<ul style="list-style-type: none"> <li>In-Market Overseas Travelers</li> <li>In-Market Cruise Travelers</li> <li>Competitor Conquesting</li> </ul>		
CHANNELS	<ul style="list-style-type: none"> <li>Addressable TV, Broadcast/Cable TV</li> <li>Programmatic</li> <li>Search</li> <li>Social</li> </ul>	<ul style="list-style-type: none"> <li>Addressable TV, Broadcast/Cable TV</li> <li>Programmatic</li> <li>Search</li> <li>Social</li> </ul>	<ul style="list-style-type: none"> <li>Addressable TV</li> <li>Programmatic</li> <li>Search</li> <li>Social</li> </ul>	<ul style="list-style-type: none"> <li>Programmatic</li> <li>Search</li> <li>Social</li> </ul>	<ul style="list-style-type: none"> <li>Programmatic</li> <li>Search</li> <li>Email</li> </ul>	
MEASUREMENT	<ul style="list-style-type: none"> <li>Website Visits</li> </ul>	<ul style="list-style-type: none"> <li>Engaged Website Traffic</li> <li>TV Content Views</li> <li>Customer Service Calls</li> </ul>	<ul style="list-style-type: none"> <li>Research Website Traffic</li> <li>TV Content Views</li> <li>Customer Service Calls</li> </ul>	<ul style="list-style-type: none"> <li>Research Action Rate</li> <li>Cost per Research Action</li> </ul>	<ul style="list-style-type: none"> <li>Best Deals</li> <li>Request a Quote</li> <li>Book Now (Start)</li> <li>Lead Rate</li> <li>Cost per Lead</li> </ul>	<ul style="list-style-type: none"> <li>Book Now (Complete)</li> </ul>



# Final Takeaways



- ✓ **Transitioning to People Based Marketing is a large effort but is vital to being competitive**
- ✓ **Developing a customer map and audience profile is vital to not only understanding your customers, but also to engage with them**
- ✓ **Customer journey development is inclusive of multiple use cases, and focus on key uses cases will help to optimize the customer journey**
- ✓ **Creating a tracking plan aligned to use case and customer journey stages will facilitate proper measurements to gauge success and inform future planning activities**

**THANK YOU**