

## Active Customer Engagement

In the earlier part of this decade, huge valuations were created around CRM technology firms which allowed B2B businesses to understand and engage their customers more effectively. The technologies, successes, lessons learned and eventual shake out that happened in the intervening years has gone on to inform all types of technology-enabled marketing – for both B2B and B2C focused businesses. You could say that businesses first had to get really smart about marketing among themselves before they could conceive of doing the same with consumers.

So while today much about mobile is focused on text messaging, advertising networks or interesting Smartphone applications, overall trends suggest the analogy to the early CRM software market may be playing out.

Before there were software embodying processes and best practices around managing customer relationships, these initiatives were performed uniquely by marketing staff, consultants, agencies and others – with variable success. CRM as a discipline succeeded once technology platforms brought common processes and techniques to marketers everywhere – first among the very well funded, then to the masses when Software-as-a-Service emerged as a cost effective way for bringing powerful capabilities to smaller businesses.

## Mobile CRM for B2C Marketers

The technologies which today are allowing marketers to engage customers via the mobile channel are rapidly moving in a similar direction. The interesting twist, however, is that most software created to date has targeted the B2C marketer, allowing them to engage customers in ways never before possible – not the B2B marketer.

These solutions are advancing rapidly beyond a first generation focus on text message interactions, to instead focusing more on the problems marketers face in targeting “on the go” people, almost regardless of B2B or B2C orientation. It’s about the mobile customer experience, more so than any one technology or approach.

Just as CRM as a general business discipline for all marketers grew by leaps and bounds with the advent of B2B offerings, so too will a new category of solution that enables B2C and B2B marketers alike to most effectively leverage the mobile channel – Active Customer Engagement.

## Active Customer Engagement

In a prior Point of View, we described a process whereby marketers can map their strategies to the mobile channel independent of the technologies and services available. The paper also touched on applications of mobile associated with common marketing programs just about every business employs. These include popular and effective uses such as couponing, direct response and brand engagement.

However, for mobile to really “take off” as a segment, relating its potential to a new way of engaging customers in profit producing ways is necessary. All parties involved in mobile marketing – marketers,

agencies and technology firms – need to envision and bring to market “whole solutions” geared around large problems facing businesses.

Today, that challenge is increasingly centering on how to engage a population always “on the go,” and no longer tethered to desktop computers or land line phones. Both consumers and workers. Passive forms of marketing are moving to the background as more active approaches emerge which allow marketers to connect with their customers anytime, anywhere. Active Customer Engagement encapsulates these ideas and carries with it a series of strategies and technologies that marketers are coming to expect from their mobile partners. These include:

- **Engagement:** Inclusive of all functions which allow a marketer to establish business objectives, define success metrics, orchestrate and then execute customer interactions within the mobile channel.
- **Insight:** Inclusive of all functions which allow a marketer to view the success of their programs relative to business objectives, analyze the attributes and characteristics of customers subject to interactions, and develop segments for use in future interactions.
- **Knowledge Base:** All functions and facilities for creating, maintaining, appending and sharing data captured in the course of executing customer interactions.

## In Practice

A system encapsulating these capabilities would allow marketers to quickly perform today what would otherwise require a great deal of customization, multiple parties and expert project management to pull off successfully. In some cases, it’s happening already. Once delivered as a “whole solution,” however, Active Customer Engagement becomes a foundation for marketing through the mobile channel, period.

Following is an imagined example of an Active Customer Engagement solution in practice, solving a marketer’s very real problem.

## Problem Definition

---

The head of marketing for the U.S. office is seeking an efficient, proven and measurable approach to demand generation and believes a sweepstakes promotion is one tactic to achieve that goal. This person’s staff recommends a mobile program given well publicized high response rates and a good match with their customer demographic.

## Project Scope

**The marketing lead on the project develops a plan that includes the following elements:**

---

- Objective setting: 1) Build a customer database (capturing demographic, attitudinal, and email/ sms opt-in data), 2) Foster brand loyalty by engaging a high value portion of the customer base, 3) Drive incremental sales with coupon redemption.
- Media buys across print, billboards, web in all major markets where the company does business.

- A call to action promoting the limited time (3 month) contest using a shortcode and unique media-assigned keywords as the means of entry.
- All registrants to receive an instant win prize. To claim their prize, registrants must visit a wired web or mobile optimized landing page. After registering, entrants receive prizes ranging from a discount merchandise coupon code to multiple high value prize tiers.
- Promotion details and registration available on the company's website and traceable landing pages for entries obtained via email and web banner referrals.
- Email sent to existing customers and prospects from the company's database (who have elected to opt in to such communications), with details of the promotion and information about entering either on the mobile web or PC-based web.

## Solution Configuration via "Whole Solution"

**A nominated marketing team member establishes the following:**

---

- Dollar investments by media buy, by keyword.
- Establish analysis goals: Based on entry form submission be able to assess results by product affinity, anticipated purchase timeframe, zip code, and age. See statistics for responses across email, web and text by keyword/media buy.
- Be able to relate response data (form data elements or response activity) to the dollar amount invested by media.
- The contest parameters and language to be communicated across: text, web and email.
- Import of customer and prospect email addresses to receive contest details via email (optimized for delivery, viewing and click through on a mobile device or desktop PC).
- Including the ability to capture feedback and opt out responses.
- Data entry for contest via mobile or PC-based web experience.

## Execution via "Whole Solution"

**Consumers called to action interact with the program in the following ways:**

---

- Texters submit keyword to shortcode, based upon billboard or magazine calls to action. Responders are then provided a link via SMS to either: spawn a mobile web session to submit their entry or request an email be sent to their desktop PC for entry later.
- Web browsers come across the contest on the company website and submit their information there. Or, they see a banner ad promoting the contest, click on it, and are directed to the company's website to enter.
- All entrants receive an email and text message response confirming their entry, and this includes a discount code for redeeming at point of sale for any clothing/accessory item.

## Analysis via “Whole Solution”

---

Following the campaign’s conclusion, multiple high value winners are chosen. During the promotion period, entrants have received discount codes sent to either their mobile device or email account. Some have taken this into stores across the U.S. to redeem for merchandise. The company has also learned a great deal about mobile consumers and the effectiveness of various media in calling them to action.

The solution provides reports and interactive analyses to answer a variety of questions, from the effectiveness of various media in driving submissions or coupon redemption, through enabling store managers to target responders with relevant, localized offers based on geographic analysis of entrants and their responses to questions posed at the point of contest entry (product affinity, likely purchase timeframe, age, etc.).

## Call to Action

As successes accumulate, buyers will come to expect that formerly disconnected elements of mobile channel marketing be stitched together and delivered as a “whole solution.” Active Customer Engagement is as much a label as descriptor for such an offering which brings best practices and processes to the task of engaging customers most effectively in the mobile channel.