



# THE CMO SOLUTION GUIDE TO LEVERAGING NEW TECHNOLOGY AND MARKETING PLATFORMS

Presented by



## WITH SPECIAL THANKS TO CONTRIBUTORS:



**CAMMIE DUNAWAY**

*Global CMO of  
KidZania*



**SETH FARBMAN**

*Former CMO of  
GAP*



**MARY ANN FITZMAURICE REILLY**

*SVP, Marketing Integration &  
Customer Insights,  
American Express*



**MAYUR GUPTA**

*Global Head, Marketing  
Technology & Innovation,  
Kimberly-Clark*



**ROSE HAMILTON**

*CMO and GM of Pet360,  
a PetSmart Brand*



**JULIE LYLE**

*CMO of hhgregg*



**CHRIS MOLONEY**

*Chief Digital Officer,  
ARIA Consulting*



**CHRISTINE NASHICK**

*Chief Customer Officer of  
DHL US*



**MARY BETH PARKS**

*SVP Global Marketing  
of Hilton Worldwide*



**MICHAEL WILLIAMS**

*CMO of Grand Prix of  
America*

# EXECUTIVE SUMMARY

As the marketer's role continues to morph at light speed in an attempt to deliver a seamless positive customer experience across all touch points, so does the technology underneath and all the headaches that come with it which include but are not limited to:

- Having a clear customer experience vision.
- Becoming the customer champion responsible for identifying and mapping the euphoric customer journey.
- Working together with technology counterparts to ensure the customer experience vision is mutually understood and the basis for technology success.
- Redesigning teams and breaking down process silos to ensure cross functional collaboration.
- Not owning it outright, but becoming an active stakeholder in the application of each technology within a well designed, integrated platform to achieve your marketing vision.

It is a challenge all CMOs are facing and the basis for why we felt it was time to produce a CMO Solution Guide to Leveraging New Technology and Marketing Platforms. The goal is not to represent assumptive solutions to your specific challenge, but to share peer solutions that provide a collective perspective on how other CMOs are tackling this incredibly difficult topic.

In **The Inherent Challenge**, we will summarize what we've heard from CMOs as specific pain points regarding Leveraging New Technology and Marketing Platforms. The first takeaway we offer you is that technology is indeed a common challenge. Of the 110 CMOs surveyed\*:

- Only 13% thought they were able to truly deliver a seamless, personalized consistent customer experience across all touch points.
- 66% felt they had a ways to go in creating a unified approach.
- 21% said they were "not sure where to start in terms of understanding a customer's end-to-end experience with our brand. I need help with such things as evaluating the right marketing platform, which analytics to use to best match up to my goals, to name a few."

\*In 4Q 2014 a survey was conducted with The CMO Club members on Leveraging New Technologies and Marketing Platforms

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***"You have to understand the experience before you deliver on it. Brand promise is inherent in the customer experience, and you set your brand up for failure if you don't get that right away."***—CHRISTINE NASHICK, CHIEF CUSTOMER

OFFICER OF DHL EXPRESS

***"My job now is to look at the decision journey of the customer, and optimize based on what the customer wants."***

—MARY ANN FITZMAURICE REILLY, SVP MARKETING  
INTEGRATION AND CUSTOMER INSIGHTS,  
AMERICAN EXPRESS

***"If you are a CMO and are not excited and engaged with technology, I question how long you will be in the job."***—Cammie Dunaway, President and Global

CMO, KidZania, Inc.

***"All the technology available is only as good as the people driving it."***—MICHAEL

Williams, CMO of Grand Prix of America, Formula 1

***"Great campaigns result from collaboration, and technology should help support that collaboration. By bringing individual brand processes together and moving to a common platform, we gain efficiencies while encouraging deeper levels of creativity across the organization."***—MARY BETH PARKS,

SVP Global Marketing of Hilton Worldwide

***"Most brands and marketers only utilize 15% of technologies and capabilities they are already paying for, so the focus should not be in the number of technologies that need to be adopted, but in "applying" them to solve business needs and changing consumer behaviors."***—MAYUR GUPTA, Global Head,

Marketing Technology & Innovation,  
Kimberly-Clark

# EXECUTIVE SUMMARY

With hundreds—if not thousands—of technology choices, it's no surprise that CMOs are overwhelmed with options, feeling as if they need to be technology experts to be successful marketing leaders today. And indeed, there is some truth to that. But there isn't enough time in the day for one person to be all things and we are at a tipping point now where customers have outpaced companies in their demands for technology advancement. We need to get to a place of clarity for execution—and quickly.

The good news is we've made huge strides in technology over the last decade and even more in recent years. The collective “we” of CMOs have been redesigning our organizations, embracing technology, mining new paths, and focusing on customer needs as the first call to action. One could argue, we've never been more customer-centric and/or competitive. What is finger-biting clear is that only those companies that are able to mold themselves to what a customer wants will be left standing.

## **So how can we help each other?**

What solutions can we offer each other as practitioners to help each other advance the greater good, putting aside competition for the moment? Thanks to those CMOs who offered to participate in this study, (those surveyed and those we interviewed listed on the cover) we offer you five solutions for today:

### **1. Be the Customer Champion Every Step of the Way**

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### **2. Become BFFs with Your CIO**

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### **3. Co-design the Optimal Customer-Driven Technology Roadmap**

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### **4. Rethink Your Marketing Organization and Processes**

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### **5. Establish a System for Continuous Improvement**

# THE INHERENT CHALLENGE

Today's biggest marketing buzzwords—big data, omnichannel, customer experience—are meaningless without clear definitions, an integrated platform, and sustainable, proven practices that move the needle.

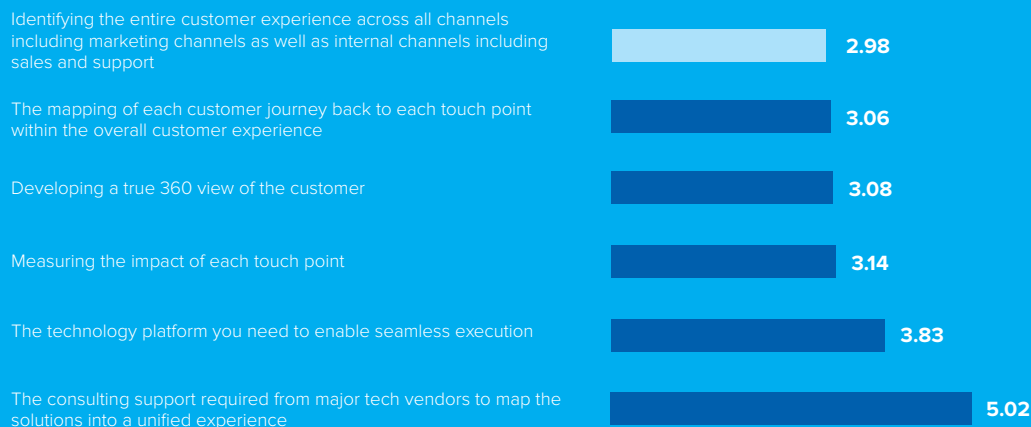
"The notion of delivering consumer experiences across channels is "unfortunately" the definition of success that in other words is a highly multi-channel mindset that puts the channel ahead of the consumer. This definition is reasonably distant from the ultimate vision of a seamless omnichannel consumer experience that is channel agnostic and consumer focused." — Mayur Gupta, Global Head, Marketing Technology & Innovation, Kimberly-Clark

We all talk about customer experience as the single most important mission of today's CMO, but what does that mean exactly? How does one deliver that positive, consistent customer experience across all touch points, regardless of channel?

Scott Monty, the former Global Digital & Multimedia Communications Manager for Ford Motor Company, wrote describing the role of the CMO moving forward: "CMOs need to be able to understand how a customer experiences a brand at all stages of their journey." And indeed, that remains the top priority area for CMOs needing development today as seen in the results of our survey below.

## Which areas do you feel you need to develop further as you take on this challenge?

(1 = HIGHEST PRIORITY)



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*“Every business talks about focusing on the customer. But few actually deliver. Why? Because digital marketing technology can’t tell a compelling story. It lacks engaging dialogue with no connection beyond the transaction. It’s lost in translation because marketers don’t speak code. And it’s confusing to the customer because marketing and IT can’t connect process and data.”*

*Take a look at your digital marketing picture. From a distance it may look fine. But look up close. It’s fragmented and the dots are not connected. You need much higher resolution. Step back and see the big picture. Zoom in on the individual customer. But you’ll need Modern Marketing technology engineered with enterprise grade data management and proven cloud performance.*

*Explore the people, processes, and technology. Create a culture of customer obsession. Simplify marketing across all channels to turn casual prospects into passionate advocates. Engage ideal customers with a meaningful experience. Personalize your brand narrative for each customer in every chapter of your story to increase engagement and revenue.”*

—ORACLE MARKETING CLOUD

What's interesting is if you break that group apart based on maturity levels—both those that are most advanced and those that are just getting started—they say “The mapping of each customer journey back to each touch point within the overall customer experience” is their top priority area for advancement. This is a clear indicator that we still have a long way to go in really understanding the customer experience at each touch point and serves as a good reminder to not only start with a map, but also continuously revisit the plan with each new advancement to ensure your customer understanding remains current.

**Why is that important? Here is the consumer perspective:**

**72%** of consumers want marketing collateral including in-store to be consistently presented across channels as a means to reinforce their perception of a given brand.

**85%** of consumers expect a consistent shopping experience across all channels including in-store.

**83%** of consumers expect and see value in a brand delivering a personalized shopping experience across all channels.

**89%** of consumers said it was important for retailers to let them shop for products in the way that is convenient for them, no matter which sales channel they choose.

**85%** of consumers equate omnichannel to a positive customer experience.

\*Sources: MyBuys, e-tailing group, Capgemini, Efma, MultiChannel Merchant

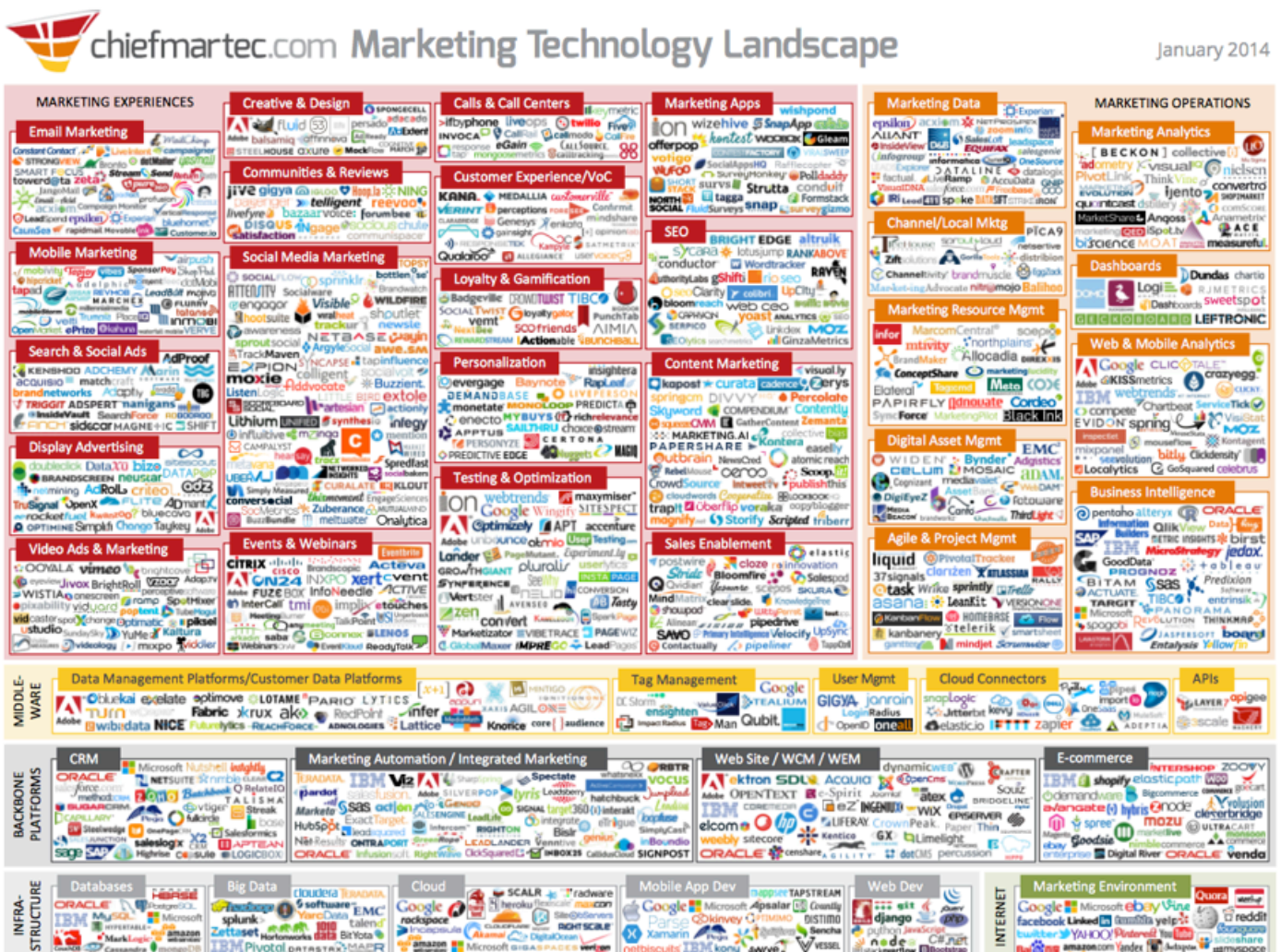
## The Technology Conundrum

“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.” —Bill Gates

Given the vast array of technology, data points, channels, and tactics available, new technology and marketing automation has stepped in to help CMOs bring all their activities together and support the delivery of the ultimate customer

experience. But has it really helped so far? Or has it simply created another overwhelming challenge for the CMO who now must become a technology expert to apply it efficiently?

This chart from chiefmartec.com exemplifies the headache of every marketer and technologist trying to design the right solution to deliver their customer experience vision—where do we start and how do we integrate?



In our survey, we asked the following open-ended question of CMOs: How have you been able to leverage your current marketing platform to integrate your marketing efforts across channels?

**CMO Responses Sorted By Their Self-Assessed Organizational Maturity in Leveraging New Technology and Marketing Platforms to Deliver a Seamless Customer Experience:**

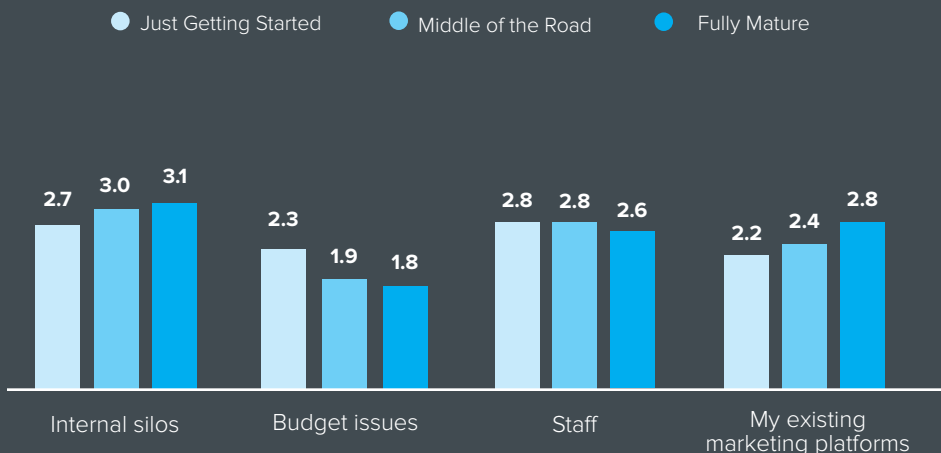
Just Getting Started	Middle of the Road	Fully Mature
<p>I'm not sure where to start in terms of understanding a customer's end-to-end experience with our brand. I need help with such things as evaluating the right marketing platform, which analytics to use to best match up to my goals, to name a few.</p>	<p>While I know some things about my customers and their journey with our brand, I do not have a unified approach in addressing my customers in a personalized way that is consistent with my brand objectives at every touch point.</p>	<p>I fully understand my customers and how they interact and engage with our brand at every touch point in their journey, my marketing platform is optimized, my analytics are robust and provide unique customer metrics at every touch point.</p>
<ul style="list-style-type: none"> <li>• Good insights on segments, omni-channel—still too much manual effort to pull together but analysis has been valuable.</li> <li>• Good views to cross-channel engagement for some customers, need to expand to all customers—too much manual effort today.</li> <li>• Not much progress here. Still running programs based on best point in time analysis with agencies help vs. dynamic cross channel program optimization.</li> <li>• Not doing a good job today with this. Still channel specific analytics and reporting.</li> <li>• Not doing much yet cross-channel.</li> <li>• A number of bolt-on solutions and have worked with IT will little success to date.</li> <li>• Not doing much today across our channels.</li> <li>• Poor integration to date.</li> <li>• Using third party to help us analyze this and create customer journey maps.</li> </ul>	<ul style="list-style-type: none"> <li>• Marketing automation is well integrated with CRM but less so with social and SEM.</li> <li>• Good visibility at summary level across all channels. Customer specific visibility a bigger issue today.</li> <li>• We use several different tools which are preventing us from integrating effectively.</li> <li>• Manually pulling data from each channel to pull together a customer journey.</li> <li>• Better views at least by customer segment, testing numerous one-to-one omnichannel presence programs but don't have the data we need from all channels to optimize.</li> <li>• Been a battle with IT to get access to data needed (both internally and externally).</li> <li>• We are now leveraging cross channel data for our quarterly marketing plans. A big first step but still way too time consuming and costly to pull together manually.</li> </ul>	<ul style="list-style-type: none"> <li>• We are developing a consistent voice, look and feel, messaging and brand image in everything we put forth.</li> <li>• We have worked hard to create a single view, timely A/B testing of products and deals, and a growing influencer group that loves our products and stores.</li> <li>• Increased insights into customer buying and shopping patterns.</li> <li>• Share with our retail stores for better customized service to our top customers.</li> <li>• Better insights on customer buying patterns so we can make better offers to them.</li> <li>• Work with agency to handle this today.</li> </ul> <p><b>Still even the best have the following to say:</b></p> <ul style="list-style-type: none"> <li>• A bit of a mess today. Too much gut and focus group reaction.</li> <li>• Not well today. Still one-off history based programs.</li> </ul>

This random sampling is reflective of the entire group of responses received. There was simply no consistent response across all respondents and even those who originally identified themselves as advanced in fully understanding and implementing against the ideal customer experience were still struggling with applying marketing automation.

### What is keeping us from moving forward?

When asked about roadblocks to success, our three groups of CMOs (based on their earlier assessment of maturity) called out the following roadblocks for success, namely Budget issues and My Existing Marketing Platforms:

What roadblocks are most problematic in terms of you ultimately meeting and succeeding in this challenge? (1 = HIGHEST PRIORITY)



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*Advances in technology have paved the way for increasingly more scientific marketing, but campaigns need a story and great content tied to it to drive response and loyalty. The challenge for today’s marketer is not just keeping up with the latest tools, but understanding how to deploy them most effectively.”*—MARY BETH PARKS,

SVP GLOBAL MARKETING OF HILTON WORLDWIDE

*“Efficiencies are key – the challenge is providing the tools and training needed to enable a single person to better own the full journey”*—MARY BETH PARKS, SVP GLOBAL

MARKETING OF HILTON WORLDWIDE

*“Different groups owned the web experience and the mobile experience. We had divided functions by business line and lost sight of the customer. My job now is to look at the decision journey of the customer, and optimize based on what the customer wants. We have to create solutions to connect legacy systems that don’t speak to each other.”* —MARY ANN FITZMAURICE REILLY,

SVP MARKETING INTEGRATION AND CUSTOMER INSIGHTS, AMERICAN EXPRESS

*“There are so many solutions out there. Managing it all requires a substantial time investment. I want a partner who can lay out a roadmap for me. We have 57 vendors just in marketing technology. And you need a data scientist who has the keys to unlock what you’re sitting on.”*—JENN MCMILLEN,

VICE PRESIDENT, MARKETING & CRM AT MICHAELS STORES

*“The key for brands is to adopt an agile mindset and culture more than just the agile rituals and tools”*

—MAYUR GUPTA, GLOBAL HEAD, MARKETING TECHNOLOGY & INNOVATION, KIMBERLY-CLARK

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With the survey insights and qualitative interviews with CMOs, we have amassed the following five solutions that we hope will help you along your journey:

**1. Be the Customer Champion Every Step of the Way**

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**2. Become BFFs with Your CIO**

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**3. Co-design the Optimal Customer-Driven Technology Roadmap**

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**4. Rethink Your Marketing Organization and Processes**

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**5. Establish a System for Continuous Improvement**

## SOLUTION #1:

# BE THE CUSTOMER CHAMPION EVERY STEP OF THE WAY

## Understand the Customer Journey and Technology Requirements for Engagement Engage the Organization Create a Customer-centric Culture

Now more than ever, CMOs need to map out every single stage of the customer journey, from consideration to engagement to purchase to advocacy and associate that back to a desired experience. Then they must associate it with the underlying technology that can deliver a personalized experience in a seamless manner across channels. Each stage may have multiple touch points and various channels that all need to be considered when creating not just the technology road map, but also the engagement and touch point road map—which is more executional for marketers. This rolls up to an evolving customer journey map which incorporates a customer's experience and interactions with your brand—regardless if you think you are driving it.

The topic of customer journey mapping has been around a long time, but often has been limited by data that was captured via the online world or transactional data from point of sale (POS). From web and email to mobile and social, there's a wealth of information to capture and use as the driver for mapping marketing automation, service, and loyalty programs. The Digital Body Language map is one representation of capturing the customer journey across all touch points.



### Digital Body Language

Source: Oracle Marketing Cloud

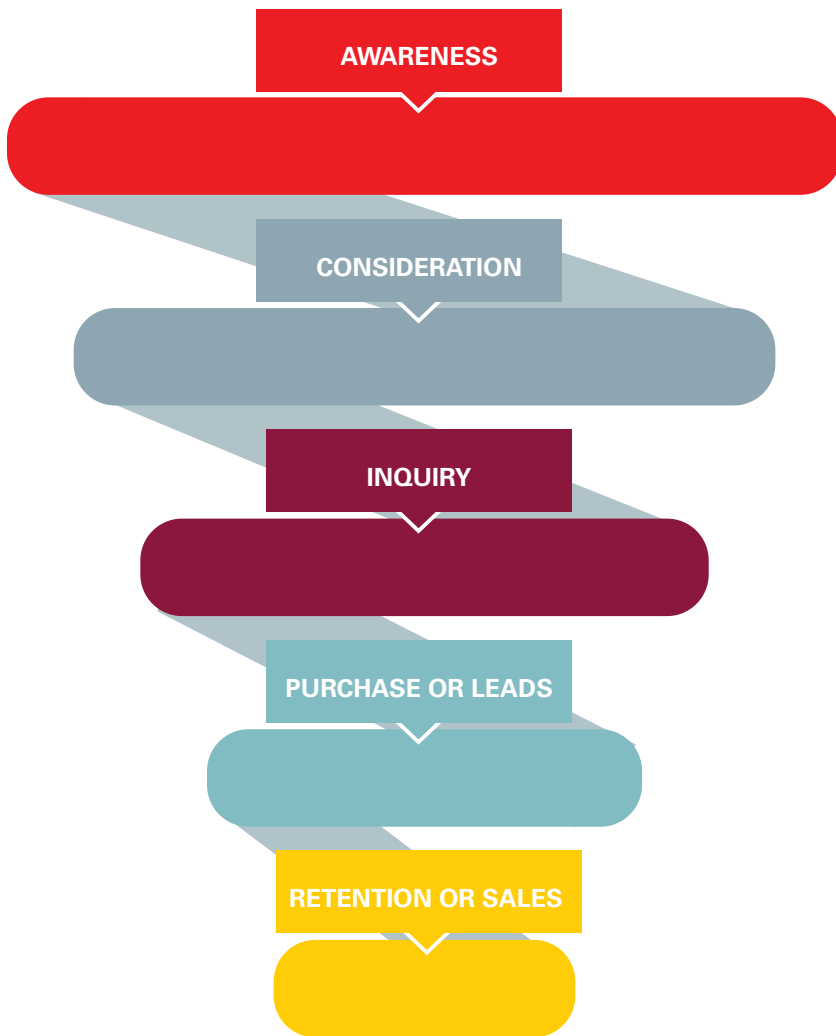
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When he was CMO of Wells Fargo Advisors, Chris Moloney, who is currently Chief Digital Officer at ARIA Consulting LLC, says it was easy to see if someone engaged online. “We built a lead attribution model that allowed us to track where customers were coming from and what content they consumed that led them to become a lead.”

However, where online tracking has been exceptionally helpful in identifying individual customer behavior online, it has also become a source of aggravation because of the limitations in connecting internal customer data with external data. Primarily this was due to an inability to efficiently link and source offline, attitudinal, and unstructured data from social channels for the big picture of the customer experience journey.

The most critical first step in designing any customer journey map is to create a dialog with your customers and find out what they think through polls or surveys. Then you can match those findings back to what you already have in online data and CRM data. Finally, you need to look for gaps and determine which customers established a relationship with you through offline channels.

Research shows that most customers seek outside input before making a significant purchase decision. This process usually includes recommendations, referrals and input from family and friends. Once a consumer has a list of choices, they typically use a process of elimination to shorten their list. Marketers must understand the importance of showing up right when consumers are at this stage of the purchase journey. It can be the key to successful marketing.



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*“Brands today have an enormous amount of data from Google Search and how it impacts the bottom of the purchase funnel. What CMO’s lack is an understanding of how important digital can be at the top of the funnel for branding and customer awareness.*

*CMOs need to trust their gut when it comes to branding and spend at the top of the funnel because it can be so hard to quantify. Even without complete ROI data, digital branding is incredibly important and deserves investment.”* —CHRIS MOLONEY, CHIEF DIGITAL

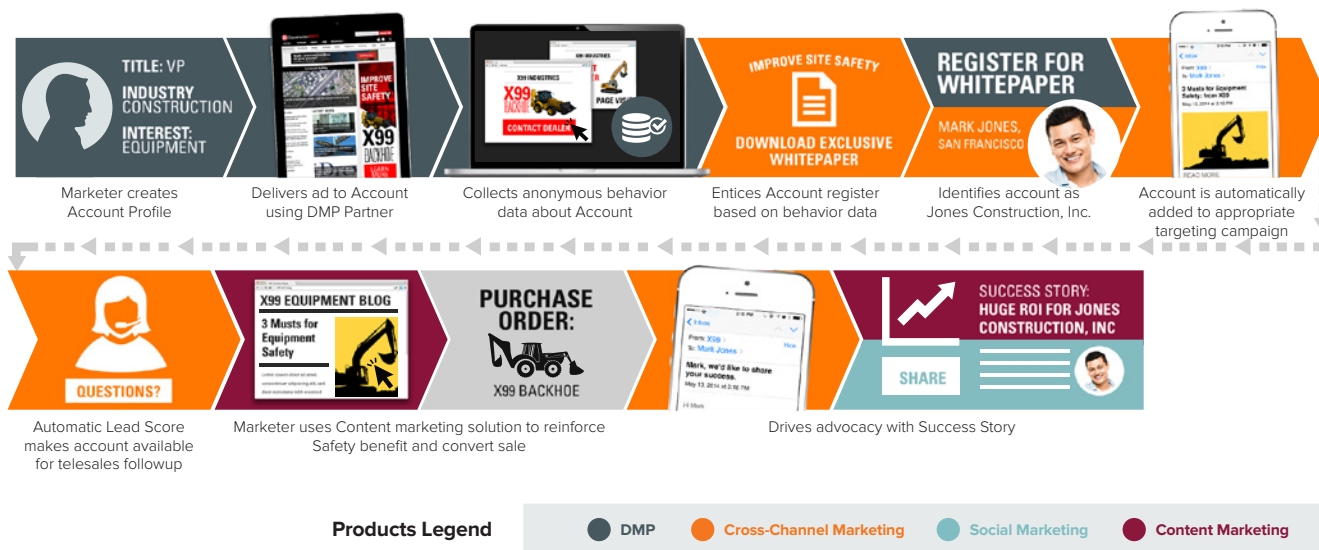
OFFICER AT ARIA CONSULTING

Here is where many marketers are frustrated. They inherently know how important digital is for top of funnel demand generation, and yet budgets are allocated based on bottom of the funnel results—conversion. Without adequate funding for the top of the funnel, it is nearly impossible to compete in today’s environment for customer mind share.

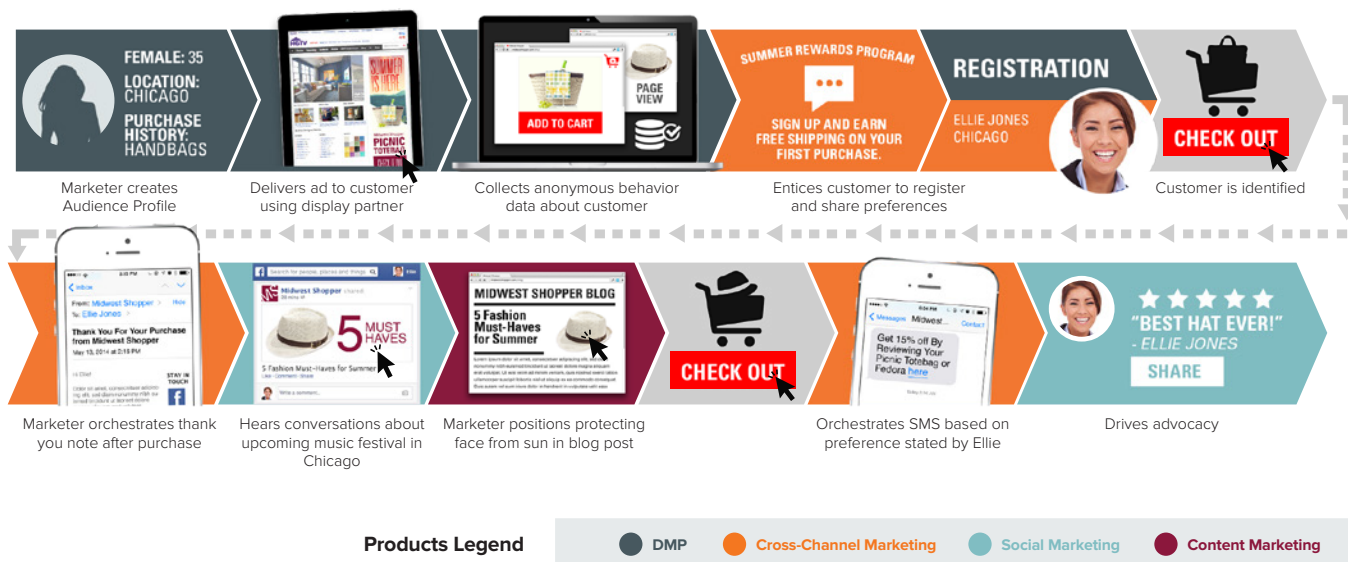
However, there is still much that can be done today to support every part of the funnel by fully defining your customer journey, mapping tools and insights to touch points, and having a marketing platform in place to help aggregate and automate as many of the engagement tasks as possible.

From a purely digital perspective, here are two examples of how to create a solution around the customer journey with what you are able to assess and automate using today's technology:

## Designing a Seamless B2B Customer Experience



## Designing a Seamless B2C Customer Experience



Experience has shown that it isn't enough to focus on seamless alone. Optimizing each point of interaction—whether it's online or on-premise—with a superior experience regardless of channel is the key to delivering the customer experience you want to provide.

Rose Hamilton, CMO and GM of Pet360—a division of PetSmart—says: “Knowing your customers’ issues—such as whether their dog is sick—is the central rally point for engagement. Our goal is to provide solutions for our customers regardless of which channel they choose to engage in and the experience may not be the same in every channel. It can be different when it's appropriate to leverage the uniqueness of a channel, as long as it's relevant. Never think solely in terms of channel, rather in terms of customer engagement and content. Are you providing high quality content that brings them closer to your brand and encourages them to engage further?”

The biggest problem here isn't a clear understanding of the customer experience vision, but proper customer attribution to ensure you can appropriately and relevantly meet customer needs using data management and activation. The role and evolution of content is another key factor to consider.

It's important to note that as CMO you own the customer experience—not just as a marketer to customers—but also as the customer champion for employees who are often on the front line delivering that customer experience. Some organizations have established a Chief Customer Officer role that works closely with the CMO to support this initiative. For example, DHL established the ICCC—which stands for Insanely Customer-Centric Culture—to push the entire company to deliver a unified customer experience.

“As CCO, my role is to enhance the customer experience at every level and every touch point, to re-imagine how our thousands of customers interact with us. At DHL Express, where service spans more than 220 countries, the mission of creating powerful customer experiences is a truly global endeavor. We want to assert a passionate, customer-centric attitude within every facet of our operation, and encourage every DHL employee to take ownership and solve problems.” —Christine Nashick, Chief Customer Officer, DHL Express

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*“...to ensure every customer interaction delivers exceptional results. The mission is to make the experience so powerful that each customer becomes our advocate, motivated by the great results we have achieved for them, and by what we have achieved together in partnership.”* —CHRISTINE NASHICK, CHIEF

CUSTOMER OFFICER OF DHL EXPRESS

For more on DHL's ICCC, see  
[“DHL'S Insanely Customer-Centric Culture Getting Customers Engaged”](#)

## SOLUTION #2:

# BECOME BFFs WITH YOUR CIO

## Speak the Same Language Collaborate in Person

“A CMO’s relationship with the CIO has to be very strong and it is for us. It’s an understanding that the role of technology is to innovate and enhance the way we’re serving guests across the travel journey—from dreaming and planning, to booking and at our hotels, to when they return home and share their experiences.”  
—Mary Beth Parks, SVP Global Marketing of Hilton Worldwide

CMOs that consider their CIO a BFF are in the minority based on responses to this question: “How have you been able to leverage your current marketing platform to integrate your marketing efforts across channels?” **Only one of the 112 respondents referenced a positive relationship with their CIO.**

**Integrate** is very much the operative word as well says Mary Ann Fitzmaurice Reilly, Senior Vice President at American Express who believes “an integrated partnership with the CIO is vital.”

The need for a CMO and CIO to be aligned was also recently highlighted in a study by The CMO Club, CIO Magazine, and EPAM entitled The CIO-CMO Omnichannel Crossroads.

The results of the study—which included survey findings of over 400 CMOs and CIOs—spoke directly to the fact that the pervasiveness of technology has created an environment where the demands of the customer experience are ones that both CIOs and CMOs must address.

And while the findings also revealed an improvement in the relationship between CMOs and CIOs, there was also a very direct and ominously worded decree: “A disconnect between the CIO and the CMO threatens to fracture the customer experience and leave people dissatisfied.” The first step to bridging this rift and improving the customer experience is learning to speak the same language by engaging personally.

### 84%

By integrating IT systems and incorporating them into their marketing campaigns, a market leader in residential steel roof production was able to introduce a targeted SMS campaign that saw a 48% response rate, generating an ROI of over 500,000 Euros.

### 30%

By aligning technology initiatives with the needs of marketing, a technology company increased their conversion rate from sales qualified opportunities to closed deals by 30%.

## Get excited and engaged with technology

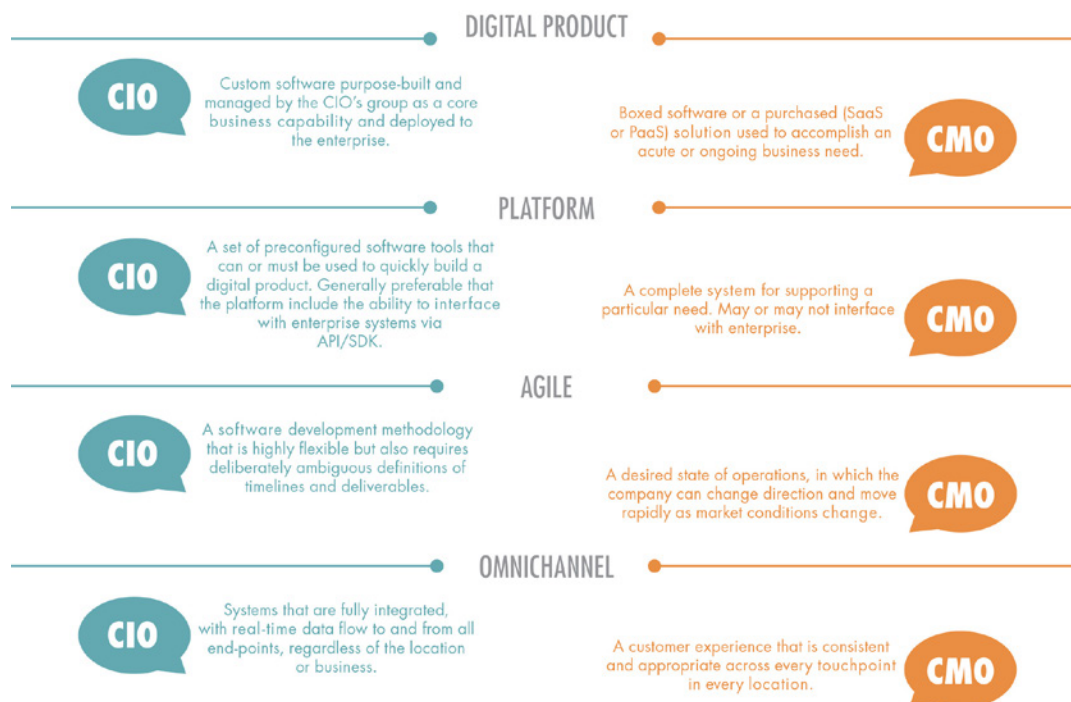
One way to become BFFs with your CIO is to embrace technology—literally. As Cammie Dunaway, President and Global CMO of KidZania, Inc. says: “If you are a CMO and are not excited and engaged with technology, I question how long you will be in the job.”

Other actions offer a variety of solutions as highlighted by these CMOs:

## Speak the same language

Or said another way, ask questions rather than make assumptions. CMOs and CIO frequently attribute different meaning to the same words. Semantics matter and are often the genesis of confusion. The below infographic from the CIO CMO study offers a first cut at the translation between CIO and CMO language. And as Cammie Dunaway can attest, taking a class in coding, which she did, was instrumental in her ability to give good direction and collaborate effectively with her CIO.

### Common Terms, Different Language:



Source: The CIO-CMO Omnichannel Crossroads, from The CMO Club, CIO Magazine and EPAM, July 2014  
<http://thecmoclub.com/resource/cio-cmo-crossroads/>

## Develop a customer-driven technology roadmap

The need to have one technology roadmap is paramount, but unlike technology maps of the past that are anchored in technology stacking limitations, the technology roadmap of the future will be a bi-product of the customer journey and the mutual understanding by the CMO and CIO of that journey. Here is a comprehensive CMO's assessment:

### The CMO's Role In Creating the Roadmap

—Julie Lyle, CMO of hhgregg

The challenge is this: Companies that have been in existence for several decades have most often been built around a traditional structure where marketing and technology functions basically exist in silos, and only intersect at key points when ERP systems or similar “back-of-house” support have been needed to implement projects that marketing has devised.

The CTO does not have a direct line of sight to external forces that affect customer behaviors and attitudes. The CTO does not have immediate visibility to competitive moves, marketing/media buying patterns, eCommerce trends, or digital marketing developments.

Thus, just as it is the CMO's responsibility to ensure all functional areas in the organization have real time visibility to external shifts and consumer insights that could affect merchandise strategies, distribution/in-stock requirements, and more—the CMO should organize this info to develop the initial road map “straw man” that is predicated on how to seize these market opportunities, get ahead of consumer purchasing behaviors, or react to competitive moves that will keep the organization in the forefront of their sector.

The CMO is also the person with the greatest access/oversight of consumer insights, market data, research, sales forecasting, and other data points that should be brought to bear to build the ROI business case for the roadmap proposed. They are also the “owner” of relationships with third party suppliers—media buyers, ecommerce suppliers, digital marketing resources, etc.—which spend most of the associated road map dollars, and which must seamlessly integrate technologies, strategies and measurement to ensure any roadmap's success.

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*“A company's success will be centered on the customer centricity focus across the C-Suite,” said Pete Krainik, CEO and Founder, The CMO Club. “The CMO's expertise on customers and the CIO's expertise on customer-centric IT/digital platform delivery will be the alignment point for success or failure.”*

*“Companies with CIO and CMO alignment achieved a 15.4% increase in annual revenue.”*

—ENHANCING CUSTOMER EXPERIENCE THROUGH  
CIO AND CMO ALIGNMENT, ABERDEEN GROUP

All of these data points will be essential to garnering support for any agreement on the roadmap, changes to it, gaining buy-in from the CEO cross-functional executives, and ultimately selling the roadmap—with associated investment and projected ROI—to the Board.

In today's world, deep and broad understanding of marketing principles, business objectives and the latest in technology tools are essential elements of the strategic plan for developing meaningful relationships with customers, and delivering friction-free, omnichannel experiences for consumers.

This can be achieved one of three ways:

1. The CMO develops—and maintains in real time—a deep and thorough understanding of the vast technology, communications, and mobile platforms that are evolving and touching consumers every day in addition to their current responsibilities.
2. The CTO/CIO develops—and maintains in real time—a deep and thorough understanding of the vast marketing, media, and customer relationship management (CRM) advances that are shaping consumers' attitudes and how they engage with brands and businesses every day in addition to their current responsibilities.
3. The CMO and CTO/CIO need to work very closely together from the very beginning of developing the strategic plan and then manage their teams and associated budgets through execution and measurement.

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*“For me Option #3 is the only realistic option and it has worked for me many times. In this context, I will tell you that the CMO should lead the process of building these coalitions with their technology colleague(s) within the business. I regularly reach out to our CTO and schedule time to sit down with him to review a “straw man” road map that we have developed, revised or significantly re-written due to changes in business priorities, shifts in EBITDA and CapEx funding targets, new technology advancements that are impacting consumer expectations, competitive shifts, etc.”* – JULIE LYLE, CMO OF HHGREGG

## CO-DESIGN THE OPTIMAL CUSTOMER-DRIVEN TECHNOLOGY ROADMAP

### Foundation: Cross-Channel, Content, and Social Marketing Platform – Open or Proprietary? Data – Data Management Platform (DMP)

Even though CMOs and CIOs are in agreement that a winning customer experience is the key to long-term competitive advantage, there remains work to be done on the technology strategy for getting there. Once you've established the relationship with your CIO and have your digital team on the same page, it's time to design your technology roadmap so you can execute on your marketing initiatives. Invest in the technologies that specifically enable your programs and campaigns and drive results and revenue for your business lines and customers. Let's start with the foundation you need to bring that innovation to life.

#### **Start with a solid foundation.**

There's a reason almost every marketing technology presentation starts with a picture of a thousand dizzying vendor logos. The rise of innovation across the digital marketing landscape has come at a cost. The average marketing stack consists of as many as 17 or more tools, requiring dozens of custom integration projects that few marketers have time or budget to support.<sup>1</sup>

Part of that comes down to understanding that ecosystem in the first place. While vendors like to invent categories to drive venture capital investment and awareness—hence the marketing tech landscape graphic you saw earlier—all of that technology basically comes down to these three layers:

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*“There are so many solutions out there. Managing it all requires a substantial time investment. I want a partner who can lay out a roadmap for me. We have 57 vendors just in marketing technology. And you need a data scientist who has the keys to unlock what you're sitting on.”*

—JENN MCMILLEN, VICE PRESIDENT, MARKETING & CRM AT MICHAELS STORES

<sup>1</sup> <http://www.signal.co/wp-content/uploads/2014/09/Signal-Cross-Channel-Marketing-and-Technology-Survey-Sept-2014.pdf>

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**1) Marketing Data.** How do marketers leverage data to better target their audiences? Examples include data management platforms, marketing attribution, analytics, tag management, and third-party data suppliers.

**2) Marketing Applications.** These are centered on the tactical execution of marketing programs and generally the external engagement layer for customers. They include campaign management tools, email marketing, and content marketing solutions that initiate and nurture customer conversations.

**3) Media.** This focuses on the delivery of paid digital advertising and includes ad networks, ad exchanges, and demand-side platforms. They enable marketers to serve up personalized display, paid search and social campaigns.

Now with that in mind, imagine that architecting your enterprise marketing ecosystem is like designing a modular building that may need to evolve over time as new initiatives are added or subtracted. Unless you want all the additions you eventually make to look forced and unnatural, it's important to build a foundation that makes it easy to connect all of the above areas of the marketing ecosystem with ease. Think of them as solutions rather than products.

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To establish your infrastructure and framing, focus on these five solution areas:

### **Data Management Platform**

Data management platforms enable you to take marketing data from just about anywhere and connect it together as a singular taxonomy to use when you want to target audiences with relevant messages. This could be proprietary data you own—such as CRM data or data collected on your website—or it could be third-party data you buy. Either way, you want a platform that takes the hard work away from doing this and empowers the marketers to target the right audience.

### **Cross-Channel Marketing**

In our era of always-on connectivity, customers don't travel in linear paths that are structured or predictable. You can imagine cross-channel marketing as a canvas or sheet music where a marketer can orchestrate specific cross-channel interactions across email, mobile, display, social, and web interactions based on behaviors and preferences. It's important that data can automatically be used based on the real-time actions a customer performs so they can direct their own paths.

### **Content Marketing**

Traditional content management systems are necessary for managing your website or product web pages. But too often, it's that complex system that requires technical help to manage and scale. Content marketing systems are fundamentally different. They make it simple for any marketer to create, manage, and scale content across the customer lifecycle and on any channel. It's now almost become a cliché to focus on the "right message, right time, on the right channel," but that's really what content marketing systems do.

### **Social Marketing**

Customers talk. A lot. But how do you turn those social conversations into something that's actionable and drives revenue? First, it starts with taking those unstructured conversations into something that's understandable. Leveraging patented technologies like latent semantic analysis can help. What trends might you hear? Well, let's imagine you were taking a pair of noise-cancelling headphones to market. When you listen to conversations, one thing that always comes up is "business travel." With integrated social marketing, you could take that data point and use it for targeting in your data management platform or for cross-channel orchestration in your cross-channel marketing.



## Analytics & Testing

Beware: Today’s “journey builders” lay in pre-defined steps on generic paths where the majority of consumers rarely travel. So it’s important to ensure your cross-channel marketing can automatically adapt to real-time behaviors. Cross-channel marketing should also empower you to analyze how these personalized interactions drive revenue (and on what channel), and test different experiences to optimize your strategy.

## Connecting third-party applications

Once you’ve established the foundation of cross-channel, content, and social marketing with a data management platform, you may want to consider adding other applications to extend your abilities for event marketing, webinars, video, or a dozen other needs. Much like how your smartphone has default email, contacts, texting, photos, and music, you may want to add apps for specialized functionality. That’s why an open platform is essential so you can take advantage of pre-integrated plug-in marketing apps.

## Adopting open platform architecture

As mentioned previously CMOs need to have a living, breathing roadmap. But it also has to be an open roadmap or platform strategy. What does “open platform” really mean? It’s the agility to integrate third-party applications and data quickly and seamlessly into your marketing platform so you are not limited to vendor-specific applications and proprietary data sources.

## Key Features of Open Platforms

- Open architecture for accessing best-of-breed marketing and sales applications.
- Ability to fully integrate third-party apps directly into your integrated marketing campaigns.
- Integration with leading data providers to automatically add revenue, industry, and geographic data to leads.
- Tools for cleaning and refreshing your marketing database in real time.
- Applications for automating manual efforts such as exporting and uploading lists.

### Why is it critical to have an open platform?

The CMO and CIO need to invest in open technology platforms that allow their organization to maximize the marketing technology investments made today, while being ready for the ones that come tomorrow. In other words, the technology purchased today should be able to connect with the technology you'll want to purchase tomorrow.

With technology changing rapidly, how can a brand or organization stay abreast or even ahead of its competition as it relates to the use of technology as a means to deliver on the optimal customer experience?

"The focus shouldn't be to always stay ahead of technology. The speed and succession in which the platforms change is mind-boggling. The focus should be aimed at making sure that you are investing in the technology that makes the most sense for your specific business and customers." —Michael Williams, CMO of Grand Prix of America, Formula 1

"By being curious and humble and not becoming a victim of "shiny object syndrome." This is one area where you have to slow down to speed up. I spend time learning and listening to my peers. For example, I was one of the first people to join IBM's CMO Advisory Board and remain very loyal to this day. While it helps

## Marketing App Examples

- *Advertising*
- *CRM Integrations*
- *Channel Management*
- *Collaboration & Community*
- *Content Marketing*
- *Data*
- *Data Partners*
- *Incentives*
- *Lead Management*
- *Mobile*
- *Offline*
- *Predictive Analytics*
- *Sales Enablement Apps*
- *Social*
- *Video & Interactive*
- *Webinars & Events*

keep me focused on changes in technology, it also provides an environment that is safe and supportive. No one knows the right answers, but you can't be afraid to ask the questions." —Seth Farbman, former CMO of GAP

"We have to start with a belief that technology will continue to evolve and expand exponentially but organizations and brands will only change and evolve algorithmically – that is the reality of the marketing world and that will not seize. Most brands and marketers only utilize 15% of technologies and capabilities they are already paying for, so the focus should not necessarily be in adopting more technologies because we should, but in their "application" and how they connect together to solve business needs and change consumer behaviors." —Mayur Gupta, Global Head, Marketing Technology & Innovation, Kimberly-Clark

### It all begins and ends with data

Data is the fuel of all our marketing activities. Your customers and prospective buyers are savvy, empowered, and carry high expectations for personalization across all interactions. Without the right data, analytics, or capabilities in place to manage our data sources, our communications will never compete for customer mindshare with those who have mastered the art of delivering personalized communication in the right channel, at the right time, and with the right message.

Multiple data sources, splintered views of consumer profiles and inconsistent messaging across multiple channels are common challenges faced by CMOs trying to manage vast amounts of data without a data management platform (DMP).

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*"Data and technology are the lynchpin that connects the experience together across channels, sharing data signals that reflect and predict consumer behavior and using marketing technologies to deliver the most contextual, relevant and personalized messaging to the right person, at the right time at a channel and touch point of her choice."*

—MAYUR GUPTA, GLOBAL HEAD,  
MARKETING TECHNOLOGY & INNOVATION,  
KIMBERLY-CLARK

*"Single source of customer data has been our biggest new success story for improved cross channel program and campaigns."*

—CMO SURVEY  
RESPONDENT

*"We need to flip the paradigm of big data. Instead of looking for big data to tell us what our customers want or try and convince them to do what we want, we should use it to evaluate what we create."*

—SETH FARBMAN, FORMER CMO OF GAP

75%

By sharing data between departments and removing inactive contacts, a professional sports organization increased online revenue by 75%.

400%

In just two months, sales reps for a leading social network reduced their average lead contact time by 400% and improved conversion rates by 250%.

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## What types of data do you use?

Here are the three different types of data that every marketer is wrestling with:

**1st Party Data:** Quite simply this is your data. It's the data that you have collected from the actions or behaviors of visitors to your website combined with data in your CRM systems, social media data, subscription data, or multi-channel data gleaned from mobile sites or apps.

**2nd Party Data:** This is essentially someone else's first-party data that you can use to help achieve your marketing goals. For example, you can form a mutually beneficial relationship with another company whereby you each share your respective first-party data.

**3rd Party Data:** This data is consolidated from websites and social media platforms other than your own. Third-party data helps marketers reach a wider audience, and when used in conjunction with a campaign, can help marketers reach more diverse and targeted audience groups.

## How would we categorize and organize it?

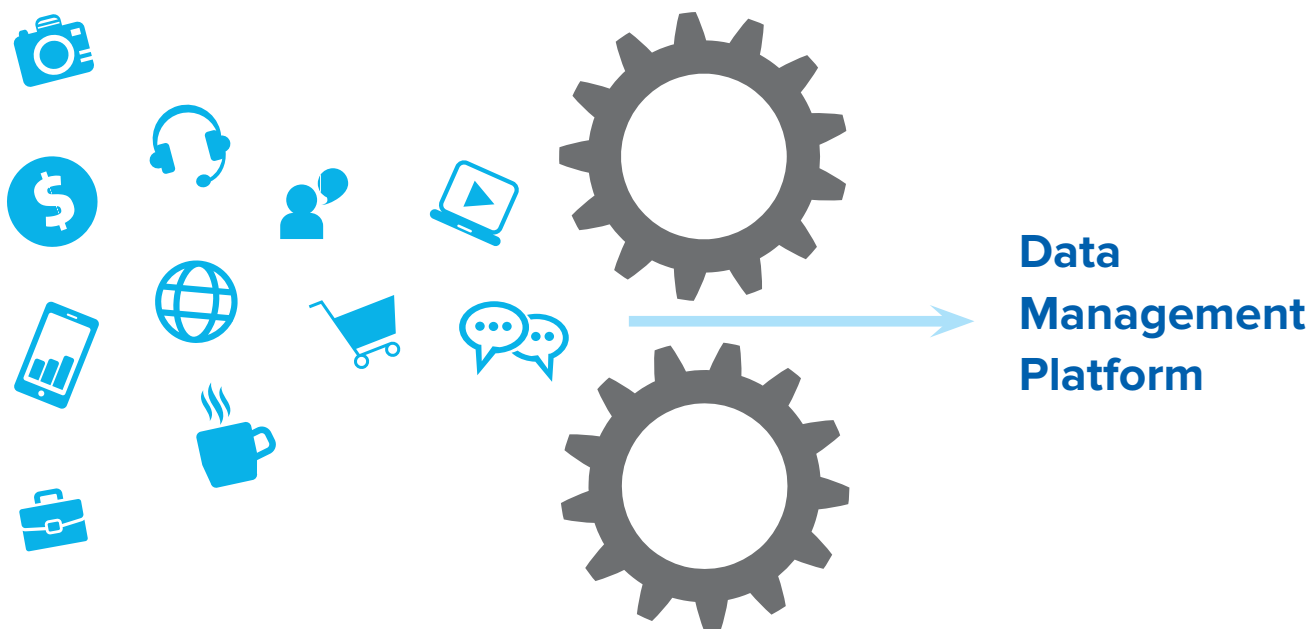
The first step is to conduct a data audit: "To assess how a company's data is fit for a given purpose. This involves profiling the data and assessing the impact of poor quality data on the organization's performance and profits."

This process dictates how data taxonomy is created so you can more effectively leverage information about your customers as groundwork for your marketing.

This is hard work but pays dividends, as a strong foundation built on the right data sources creates an excellent foundation for defining the most qualified prospects.

## How do we manage it?

A data management platform (DMP) is a centralized marketing data tool that allows you to create target audiences based on a combination of in-depth first-party and third-party audience data. You can more accurately target campaigns to these audiences across third-party ad networks and exchanges. You can also measure with accuracy which campaigns performed the best across segments and channels to refine media buys and ad creative over time.



You can use your own online and offline first-party data to create audience segments for display, search, video, and social campaigns. You can apply it to ad campaigns targeting audience across the purchase funnel and get visibility into the ROI each campaign delivered for each segment. Marketers can pull in and analyze all audience data presenting a 360-degree view of how campaigns perform against specific target audiences.

**You need a DMP if:**

- You manage multiple online campaigns across different networks, exchanges, and publishers
- You want to ensure you have control over your data assets, maximize segmentation, prevent leakage and monitor partners' usage
- You currently run retargeting and would like to enhance your scalability, nich-targeting and messaging capabilities
- You want to better target campaigns to improve response rates, conversions, and brand recognition
- You buy media placements, third-party audience data or bid on ad exchanges on a regular basis
- You want to control advertising costs and improve overall ROI

## RETHINK YOUR MARKETING ORGANIZATION AND PROCESSES

Skills – Creation of New Cross-Functional Teams

Talent – Data Scientist and Campaign Artist

There are many formal and informal opportunities to create collaboration across marketing departments and technology. You can integrate with or without formal organizational changes.

### Create new cross-functional teams

Cammie Dunaway, President and Global CMO of KidZania Inc., invited her CIO to join her at a KidZania property in Mexico where together they walked the floor. From there, they rolled up their sleeves to evaluate every aspect of the customer experience and identify how technology should not just deliver, but inspire their customers in new ways. They instituted a routine cross-functional meeting with their teams to ensure they were staying on track and applying insights they gathered. They also set up a standing weekly one on one where they could connect on any issues the teams were having and align on new ideas and priorities. Dedication the time to get to know each other was a critical part of success.

Rose Hamilton, CMO and GM of Pet360—a division of PetSmart—not only oversees marketing, but also technology. She is truly a CMTO—a Chief Marketing Technology Officer—and is able to fully implement a cross-functional, integrated team. Among all the work processes redesign, she leveraged seating arrangements as a way to break down silos and ensure marketing and technology are working together.

Even if you don't own technology, you can collaborate with your CIO to create dedicated work teams to support your vision or take it one extra step and formalize the new hybrid team that sits beneath both of you.

"I report up into our CMO, Clive Sirkin who in partnership with our CIO has given us the platform to establish a global marketing technology organization that

41%

Using progressive profiling and content marketing, a content management software company saw the number of new sales-ready business leads increase by 41%, significantly impacting revenue.

25%

When an industrial automation company implemented cross-channel marketing mapped to the customer journey, conversions improved by 25%.

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works very closely with the brands, marketing planning and agency teams. Our goal and imperative is to leverage enterprise, innovative and tactical/localized marketing technologies across the worlds of Content, Data and Commerce to ultimately deliver a Seamless Consumer Experience within this complex Omni Channel World.” —Mayur Gupta, Global Head, Marketing Technology & Innovation, Kimberly-Clark

### **Hire left-brain and right-brain talent**

As critical to building the right culture and cross-functional environment is hiring the right talent. While marketing has long been the realm of creative campaign artists, they must now share the stage with data scientists.

“It’s very important to build marketing teams based on digital and technology capabilities and how skillsets align with overall marketing objectives and strategic priorities for the company. When we create that alignment, we enable results that can be truly transformative for our campaigns and the company.” —Mary Beth Parks, SVP Global Marketing of Hilton Worldwide

Harvard Business Review called Data Scientist the sexiest job of the 21st century and the White House has even acknowledged the need by hiring its first Chief Data Scientist earlier this year. The role—defined by Harvard Business Review as “a high-ranking professional with the training and curiosity to make discoveries in the world of big data”—is not only becoming popular but also competitive as companies seek to hire the most qualified. Companies such as Google are causing a growing amount of frustration among CMOs who sometimes cannot compete with the offers of high technology companies.

“All the technology available is only as good as the people driving it.” —Michael Williams, CMO, The Grand Prix of America, Formula 1

And then there is the infamous Millennial. We’ll save that topic for a different day, but in case you missed it, check out this daring article from Lauren Martin in Generation Y called [\*50 Things About Millennials That Make Corporate America Sh\\*T Its Pants.\*](#)

## ESTABLISH A SYSTEM FOR CONTINUOUS IMPROVEMENT

### Results Oriented – Test, Learn, Repeat

Once the customer journey, team alignment, and technology requirements have been identified, you need to establish a system for continuous improvement. The customer is outpacing companies in terms of their expectations for personalized service compared to a company's ability to act on the information—both technologically and analytically. It is important to create a continuous loop of information to drive intelligent changes to the roadmap shared between the CMO and CIO.

#### **Be vigilantly agile and risk receptive**

Remember though, that the need to be vigilantly agile is not necessarily the same thing as speed.

“Technology has completely changed what fast means. We are on an agility mission right now because speed is different than agility. What we’re trying to build is the capability to go in new directions fast, not just go straight ahead fast, and that’s a really different muscle for us to build.” —Jeff Jones, CMO, Target

“Agility is more important today because of the velocity of technological advancements, the convergence of channels, and the increasing empowerment that instant access to information provides today’s consumers.” —Julie Lyle, CMO of hhgregg

The CMO of today must—in addition to being agile—be open to taking chances and remain risk receptive. However, this stance is not about taking risks just for the sake of taking them, it’s about taking calculated risks to realize innovation and achieve success.

“Technology provides a consistent feedback loop, which helps a brand know if its products, service, experiences and messages are useful to customers. Today, we are still required to aggregate information and insights from many tools—CRM, social listening, POS and ecommerce data, etc.—but together, they provide an almost

immediate read on how you're doing. That should translate to greater risk-taking and invention, which ultimately lead to success." —Seth Farbman, former CMO of GAP

### **Test. Learn. Repeat**

It is vitally important for CMOs to not dive headfirst into any new technology without running a pilot or test program first to see if it does in fact align with your business needs and goals.

"The key for brands today is not only adopt an agile mindset and culture but to also have an increased focus on testing."—Mayur Gupta, Global Head, Marketing Technology & Innovation, Kimberly-Clark

Tracking marketing ROI via technology is the most transformative factor marketers face today. An analysis-driven marketer understands the value in transforming a company website into a powerful tool for systematically driving lead generation and cultivating, engaging, and capturing sales opportunities.

"Technology enables us to monitor how customers respond to the experience we offer at each touch point. We can test enhancements, track impact (from the customer's POV), and leverage the insights we garner for continuous improvement."—Julie Lyle, CMO of hhgregg

Marketing automation helps manage your workflow so you can glean key data that will maximize your customer relationship management, social monitoring, and business intelligence investments.

Core analysis metrics and key performance indicators (KPIs) can include:

- Deliverability rate
- Click through rate
- Form conversions
- Growth rate of followers
- Engagement rates and referrals
- Cost per lead
- Cost per click
- Leads generated
- Content influence
- Marketing Qualified Leads (MQLs)
- Sales Qualified Leads (SQLs)
- Lifetime Customer Value
- Lead to close ratio
- Customer retention rate
- Projected return on investment

## 56%

By realigning the metrics they used and focusing only on quality leads, a manufacturer saw a 56% increase in lead conversion, even though they were passing fewer leads to dealers overall.

## \$120 Million

By focusing on accounts, using technology solutions to provide the right metrics, and driving results through those metrics, this global leader in technology business solutions achieved a 30–40% lift in targeted account engagement worth approximately \$120 million.

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Needless to say these are merely a sample of the metrics that can be tested and measured. As the CMO, you and your team will know precisely what KPIs matter the most when it comes to reaching your specific marketing goals and business needs. The key is continuous learning and leveraging that learning to optimize your skills.

“Even the best golfers in the world still practice every Sunday. The same principle applies here. Marketers can never give up or rest up. They need to continually seek out new ways to better themselves.” —Chris Moloney, Managing Partner & Chief Digital Officer at ARIA Consulting LLC

### **The Payoff Of Marketing Measurement On Revenue Performance**

The ability to track key performance indicators with analysis tools is emerging as a path to greatly increase marketing's ability to impact revenue performance. Progressive marketers are now using these tools as radar to spot and accelerate the programs having the biggest impact on sales forecasts and pipeline.

“Many organizations struggle to compute ROI. Merely one-fourth report having established key performance indicators to help them measure the impact of their digital transformation. The three biggest reasons why: companies have trouble defining how to successfully define key performance indicators (KPIs), lack of management skills to carry through on KPIs, and needing cultural changes to make KPIs work.” —Embracing Digital Technology: A New Strategic Imperative, MIT Sloan Management Review

Smart marketers are realizing that measurement tools allow them to reverse-engineer their strategies and processes, providing fact-based intelligence on factors such as:

- Campaign performance
- Media mix
- Content offers
- Market segmentation
- Revenue contribution

Ultimately, ROI and other metrics point to how marketing is helping to influence and drive revenue, and more marketers are being evaluated and compensated against revenue performance metrics. It is the major task of the CMO to make the right connections between new important customer metrics and contribution to both top and bottom line growth. This in turn will build credibility with the C-suite and Board, leading to more effective budgeting discussions.

# CONCLUSION

John Sculley, the former CEO of Pepsi and Apple once said: “The future belongs to those who see possibilities before they become obvious.”

It would appear that a great number of CMOs are already acutely aware of the possibilities that await them as it relates to the overall customer experience. When queried what the difference in their role today versus what it will look like five years from now, respondents indicated by a nearly two-to-one margin they think they will have a larger role in terms of the overall customer experience.

A random sampling of replies include:

“My role will be much bigger as tools will make it easier to develop more comprehensive cross channel programs.”

“My role will continue to expand as marketing platform and tools make it easier for us to measure success of customer experience changes led by marketing.”

“Should have much larger role in the future as marketing gets tied to customer experience more and more.”

“Will have bigger role in the future as customer experience plays a bigger and bigger role in brand building.”

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When the only constant is change, the new role of the CMO dictates the use of new technologies and marketing platforms to increase competitive advantage. There is an undeniable need for CMOs to be constantly vigilant when it comes to monitoring the technologies and platforms they utilize and depend on. The health of their brand demands it.

But that is only part of the equation. For not only must CMOs consistently keep one eye on their present technologies and platforms, they must keep their other eye on the future. Each day sees a new technology or platform emerge that could potentially impact their job in a very profound way.

The key will be for CMOs to work closely with their BFFs (AKA CIOs) to weed through the seemingly never-ending pool of new technologies and platforms and make informed, intelligent decisions that positively impact their organization.

As we close The CMO Solution Guide to Leveraging New Technology and Marketing Platforms, we will leave you with one final thought. It comes from Christine Nashick, Chief Customer Officer at DHL Express.

“The danger for brands and organizations that do not deliver a consistent positive customer experience across all touch points are many, but at the top of the list are loss of loyalty and patronage and a negative impact on brand reputation.”

## ABOUT THE AUTHORS



Nadine Dietz,

**Chief Marketing Officer of The CMO Club**

With 20 years of management experience through manufacturing, retail, research, consulting, and software design, Nadine has a solid appreciation for both B2B and B2C executive challenges. From hands-on customer engagement tactics to savvy C-level strategy design her passion has always been in providing simple solutions for sophisticated problems and delivering remarkable customer experience. This drive has led her to The CMO Club, where she is responsible for helping members connect and solve their toughest business challenges today.



Steve Olenski

**Sr. Content Strategist/Sr. Writer, Oracle Marketing Cloud**

From being named one of the Top 100 Influencers In Social Media and a Top 50 Social Media Blogger a few years ago to most recently being named one of the 26 Content Marketing experts to follow in 2015, Steve has established himself as a well-respected influencer in the marketing, advertising and branding space. A regular contributor to Forbes and Huffington Post, his work has also appeared in Business Insider, Social Media Today, Marketing Land, Ad Age and Ad Week to name a few. His writing and content skills are on display on a daily basis in his role as Sr. Content Strategist/Sr. Writer for the Oracle Marketing Cloud.

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## About The CMO Club

The CMO Club is the world's most engaged and inspired community of Senior Marketing Executives who help each other solve their biggest challenges, within a candid, trusted, and sharing environment. Collaboration fueled by inspiring events and within the members-only Digital Solutions Clubhouse raises the standard for what is required to be a successful Chief Marketing Officer. With more than 850 members and a no vendor selling policy, The CMO Club is the go-to center for today's Senior Marketer for peer-based personal and career success support. For more details on membership or becoming a thought leadership partner, please visit [www.thecmoclub.com](http://www.thecmoclub.com)



## About Oracle Marketing Cloud

Modern Marketers choose Oracle Marketing Cloud to build customer obsessed cultures, create and manage ideal customers, and power revenue performance. They transform marketing by truly knowing the customer, engaging with cross-channel marketing, and achieving data driven accountability. Integrated information from cross-channel, content, and social marketing with data management and activation along with hundreds of app and data partners enables them to target, engage, convert, analyze, and use award-winning marketing technology and expertise to deliver personalized customer experiences at every interaction. Visit [oracle.com/marketingcloud](http://oracle.com/marketingcloud)

