Seven top tips for best practice marketing campaign management

A step-by-step guide to planning, executing, and analysing high-performing marketing activities.

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Seven steps to success

When it comes to data, marketers are spoiled for choice. This is both blessing and curse – with so much information readily available, how do you know where to focus your efforts? What are the current best-practice tips for campaign management?

The same can be said for marketing technology (MarTech). Where and how does technology fit into the mix? Where should you rely on tech, and where is your time best spent applying your marketing skills?

Armed with this knowledge you'll be able to begin every new campaign with complete confidence, and understand exactly what it takes to deliver marketing success.

That's how we're here to help you, seven questions you should answer to build campaigns that really work.
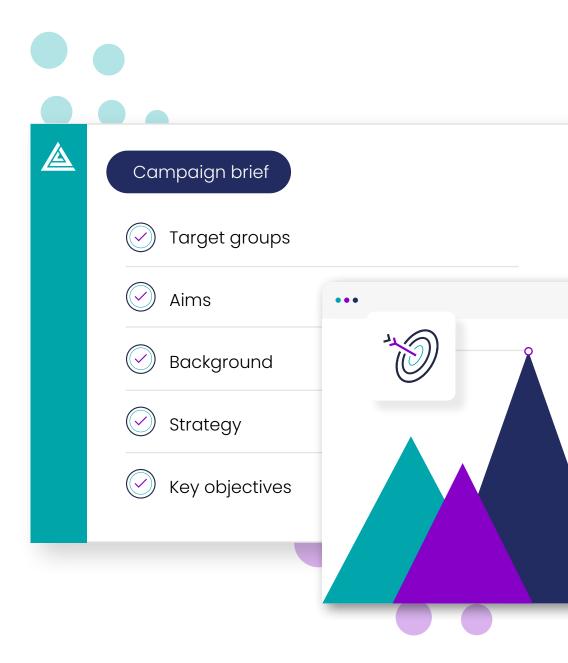
Marketing data

1.

What is
the strategy?

In marketing, everything has a reason. Your campaigns exist to serve a specific purpose. So from the very earliest stages of planning you must decide what you are actually trying to achieve. What is the main purpose of the campaign? Revenue growth? Strengthening customer loyalty and relationships? Brand presence and awareness?

Once you've identified and articulated exactly what you are hoping to achieve, you then need to consider how campaign success will be measured. Goals and metrics allow you to rate success, refine future campaigns, and provide proof that marketing spend is generating valuable results.

Without goals, can you be sure your campaigns are really delivering? How can you tell what worked – and what didn't? How can you tell if the next campaign is more successful without a baseline against which to compare? The fact is, you can't, which is why clarifying how success is measured should never be overlooked.

All this information will be captured in your campaign brief, which will document the key objectives, target groups, aims, background, and strategy of your activities. Your campaign brief will contain the information you need to get the campaign off the ground, and the detail you need to measure its success on completion.

Campaign brief

✓ Target groups

✓ Aims

✓ Background

✓ Strategy

✓ Key objectives

2.

Who are you targeting?

Now you know what you want to achieve, who do you need to reach? Campaigns have become increasingly customer-centric as buyers demand personalised messaging and offers. Putting the customer at the heart of your activities is extremely effective – when done properly.

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Identifying the right people to target relies on having access to the right customer data first. Ideally you have a customer data platform (CDP) or other method of uniting data from across your organisation to create a single customer view (SCV). It's possible to build a very detailed picture of each client if you can unite information from all of your information stores – CRM, email, call centre logs etc.

If that information cannot be unlocked, your campaigns and targeting will be much less effective.

An accurate SCV will be invaluable for defining audience segments, allowing you to narrow down who you are going to target. Technology can help you create smarter segments:

Contact rules

As your segments become more granular you will begin to see audience overlap, so how do you decide who receives which message? Are customers already in a campaign and should be excluded? Which campaigns should you prioritise?

Using data analytics you can establish where there is overlap. A centralised contact history is essential in helping you to build out exclusion rules to make sure that you don't bombard people with multiple messages at the same time. Instead, you can ensure that everyone receives the message most tuned to their interests and preferences – and the most likely to drive engagement and conversions.

Predictive analytics

Applying predictive analytics shows important information about customer purchasing habits. Importantly, you can see who has the highest affinity to convert. You can also use Profiling and Lookalike Modelling to identify prospects with the similar characteristics to current customers.

Using Best Next Offer you can accurately predict what customers are most likely to purchase. You can then create new segments based on these predictions.

Event-triggered campaigns

Rather than sending out batch emails, campaigns can be built around specific events. When a certain condition is met (examples of which we'll share in the next section), an email is triggered automatically. These event-triggered messages are more timely and relevant – and are on average 500% more effective than a traditional mass email campaign (in terms of click-through rates). These event rules allow you to create very small target groups with very high engagement rates.

Best next offer

500% more effective

3.

When do you target them?

Event-triggered campaigns dramatically increase the likelihood of targeting the right person at the right time. For example:

A customer passes a loyalty points threshold to reach a new tier or unlock additional benefits.

A customer passes near a physical store, triggering a geolocation-based push message.

Purchase history analysis shows a customer buys a pair of jeans roughly every ten months. A sales offer email could be sent to the customer nine months after their previous purchase as a 'nudge'.

These triggers are specific and precise – which is why they work. For other campaigns take some time to consider buyer motivations and the most effective frequency of messaging.

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4.

What's the message and content?

Technology can help with audience identification and timing – but you still need the marketer's skill to create compelling messages. Personalisation means crafting a precise piece of content for each specific segment to maximise campaign impact.

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As you research your customers and prospects, you'll be able to identify these segments and group them for targeting. You'll discover who is a high-spending VIP, who only responds to special offers, who is dormant, and more. These insights will then tell you how best to communicate with each group.

Using your insights into transactions and purchasing patterns you can begin creating tailored offers for your customer groups. Your VIPs receive one message, while the deal-chaser receives another – each segment receives something that is tailored specifically to their interests and preferences.

And like every other aspect of your campaign, make sure you are capturing performance metrics for each message. This will allow you to identify opportunities to refine and improve future offers.

Another more advanced technique is to systematically test different content alternatives in an on-going champion/challenger process. As seasonality and other factors change, the best content today may not be the best contect tomorrow.

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How do you reach your customers?

Email may be an incredibly effective medium, but in an omni-channel world are you missing other opportunities? Your clients have different contact preferences, so it makes sense to use that to your advantage.

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You also need to make some value decisions. Email is cheap and reliable for low-value customers, but more expensive channels like direct mail may be a better choice for high-value clients with a higher chance of conversion. Plus you may have varying contact permissions by channel.

Again, your choices are reliant on having accurate data to work with. Collecting your own detailed information is becoming increasingly important as we move into the post-cookie world. Without the ability to track users constantly, third-party data sets driven by tracking cookies will become increasingly outdated, irrelevant and unpopular.

As you prepare your campaign for execution, create some control groups for reference. This allows you to compare results and optimise campaign performance. Was there any uplift compared to the group that didn't receive your campaign? Were the results an improvement on previous campaigns and channel choices? All this is vital information for planning future activities.
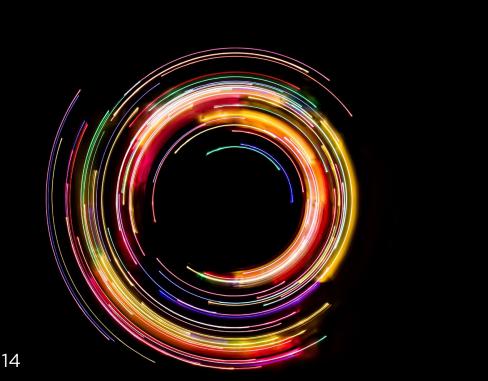
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How do you capture and measure responses?

Measuring ROI and attribution is critical – to ensure your campaigns are profitable and to prove that your efforts are yielding results. If you cannot measure responses, there is no point in the activity.

Email opens and click-throughs provide some insights, but there are other metrics to consider. Did the user actually convert? Did they purchase the specific item you wanted to sell, or did they opt for something else? Did they register for an event? Did they turn up? Did they contact your business? How did they make contact?

Measurements and metrics allow you to better plan your next steps. What is your response to these customer activities? What are the next steps on the customer journey? And how can you help keep them engaged in another loop of the customer lifecycle?

Combining the results of your campaign with historical data will help you clarify your next steps and improve the effectiveness of your activities.

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7.

How can we improve next time?

The customer journey never ends — and neither does campaign analysis and improvement. In the same way that your business tries to constantly improve the customer service experience, your campaigns must also improve with each cycle.

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Your campaign project debrief must identify which channel was the highest performing. You need to know who responded, what they responded to, and how and when they actually took action. This allows you to see what worked, what didn't work, and what can be improved next time.

Consider the movements between your marketing segments by comparing them before and after the campaign. You may have achieved a short-term campaign goal, but it may have also resulted in a decline in the number of your VIP customers. You need to understand the fundamental drivers behind your campaigns, not just a summary KPI figure.

Drill into your campaign results, going beyond basic conversion units. There are usually deeper trends to discover that are even more valuable, such as best performing channels, open rates, or engagement on specific products or offers.

Technology will play a pivotal role in this process, carrying out complex tasks like calculating affinity scores and likelihood of conversion – metrics that once involved a high degree of guesswork can now be calculated more accurately, automatically.
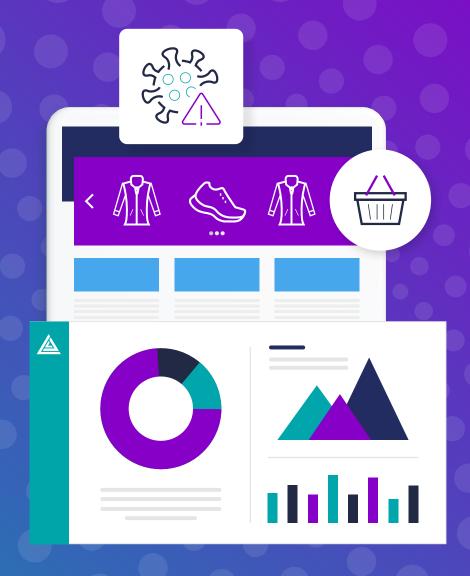
And by the time you complete stage seven, it's time to begin the cycle all over again. With a little more knowledge, a bit more experience, and plenty of fresh insights to guide you.
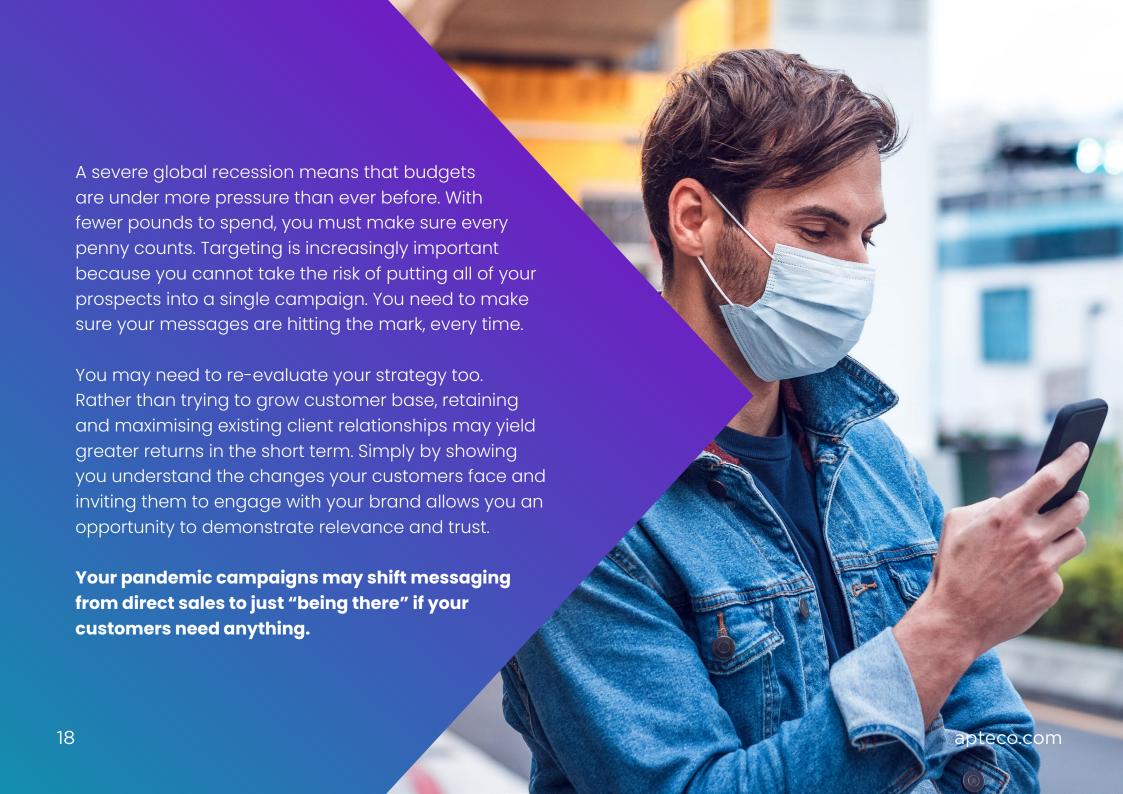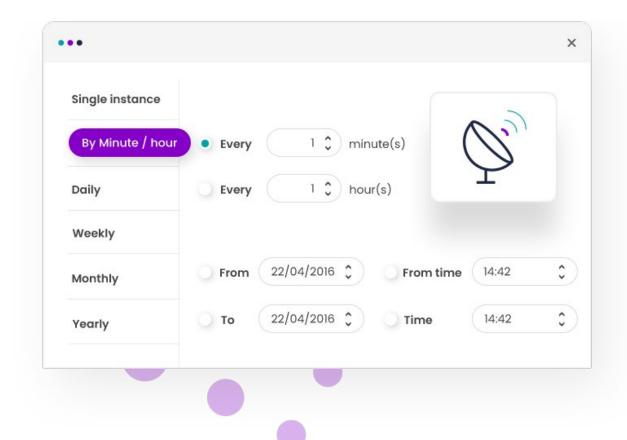
The Covid effect

The COVID-19 pandemic changed almost everything overnight. As lockdowns spread, consumers were forced to conduct most of their shopping online. The pivot to digital accelerated as struggling retailers and businesses were forced to make as many of their products and services available online as possible.

Now, more than ever, businesses are relying on data to help them make sense of a rapidly changing, unpredictable trading environment. How is customer behaviour changing? Has digital grown? Which channels are performing best? Most importantly, how can you apply those insights to boosting conversions?

A severe global recession means that budgets are under more pressure than ever before. With fewer pounds to spend, you must make sure every penny counts. Targeting is increasingly important because you cannot take the risk of putting all of your prospects into a single campaign. You need to make sure your messages are hitting the mark, every time.

You may need to re-evaluate your strategy too. Rather than trying to grow customer base, retaining and maximising existing client relationships may yield greater returns in the short term. Simply by showing you understand the changes your customers face and inviting them to engage with your brand allows you an opportunity to demonstrate relevance and trust.

Your pandemic campaigns may shift messaging from direct sales to just "being there" if your customers need anything.

Technology to complement your marketing nous

Marketers have always had a lot to do when it comes to devising, implementing, and optimising campaigns. Now with enormous data sets to work with, the task is at the same time both easier and more complex. Complex in that there are a myriad of journeys and channels to assess, but easier in that automation makes it possible. In fact, it's fair to say that it would be almost impossible to manage such complexity without automation.

Technology is essential to collecting information and turning raw data into actionable insights. It can also help you to make fine-tuned target groups with a higher degree of conversion.

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Apteco adds intelligence to contact rules to improve timing of messages

In order to be heard in an increasingly noisy marketplace, your campaigns will need to marry marketing art and technological power. This combination will allow you to define what needs to be done, how it is put into action – and how to refine your next campaign.

The Apteco Marketing Suite™ makes this marriage possible. As well as uniting disparate data sets, Apteco adds intelligence to contact rules to improve timing of messages. And with the addition of affinity scores, marketers can even automatically determine which journey each individual is best suited for.

Using insights to automatically drive actions allows the marketer to increase campaign effectiveness, keep customers engaged, and ultimately lead to winning loyal fans and advocates for your brand.

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Book a one-to-one Apteco Marketing Suite™ demo to get a closer look at the technology that enables you to maximise campaign performance.

BOOK A DEMO

Or call us on +44 (0)1926 407 565
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Creating and building industry-leading software to convert customer data into actionable insights.

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