

# How Mature Is Your Omni-Channel Marketing Strategy?

The Iterable Readiness Assessment



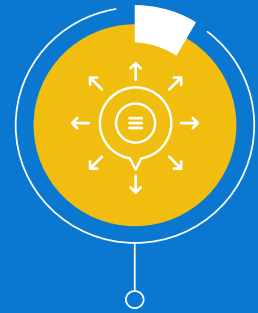
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# You Have to Know Where You Are to Get Where You Want to Be

Every marketer's ultimate goal is to provide an engaging, omni-channel experience that is highly relevant and personalized to each individual customer. After all, your business's success hinges on turning the average consumer into your most loyal fan. Of course, achieving this goal is easier said than done!

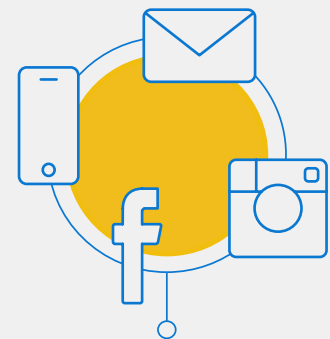
With all the different ways that you can interact with your audience—via the web, email, direct mail, text messaging, social media, and more—it can be overwhelming to orchestrate each touch point in a unified, cohesive manner.

If you're wondering how you're doing when it comes to implementing an omni-channel marketing strategy, then take our readiness assessment for a quick gut-check on the current state of your organization, as well as actionable steps that will fuel future growth.



**89%**

OF CUSTOMERS ARE RETAINED  
BY COMPANIES WITH  
OMNI-CHANNEL CUSTOMER  
ENGAGEMENT STRATEGIES



**9%**

OF MARKETERS CAN CURRENTLY  
ENGAGE CUSTOMERS ACROSS  
MEDIA CHANNELS ON A  
CONSISTENT BASIS

# How Mature Is Your Omni-Channel Marketing Strategy?

To find out if your business can successfully fight the advertising noise and grab your audience's attention across all channels, answer these eight questions below by marking the response that describes your strategy the best.



## How quickly can you create and deploy a new campaign?

- A. It can take months to fight through all the red tape involved
- B. It can take weeks for our developers to segment customers
- C. It can take days to build out workflows in our current tool
- D. It only takes a few minutes to launch a campaign



## How often do you A/B test your messaging?

- A. Rarely, we usually don't have the time
- B. Sometimes, we typically test subject lines
- C. Often, we test both copy and creative
- D. Always, we test anything and everything



## How many data points do you use when segmenting your audience?

- A. Very few or none, we send the same messages to our entire list
- B. Dozens of data points, we segment by demographic data
- C. Hundreds of data points, we segment by behavioral data
- D. Thousands of data points or more, we segment by individual customer data



## How automated are your marketing campaigns?

- A. Not at all automated, we usually manually send all messages
- B. Slightly automated, we trigger transactional messages
- C. Mostly automated, we've designed customer lifecycle campaigns
- D. Highly automated, all messages are triggered off customer behavior



### How many marketing channels are you currently leveraging?

- A. Predominantly one, but are looking to add more in the future
- B. Between 2-5, mainly online channels like email, mobile, web and social media
- C. Approx. 6-10, we incorporate offline channels like direct mail as well
- D. More than 10, we're continuously expanding our marketing stack



### How coordinated is your messaging across channels?

- A. Not at all coordinated, we rely heavily on one channel
- B. Slightly coordinated, we use multiple channels but rarely align messages
- C. Mostly coordinated, we typically keep messaging consistent
- D. Highly coordinated, we provide a seamless customer experience



### How personalized is your messaging to each customer?

- A. Not at all personalized, we send all our customers the same messaging
- B. Slightly personalized, we reference customers by name
- C. Mostly personalized, we alter messaging by customer interests
- D. Highly personalized, we tailor each message to the individual



### How aligned are the various teams within the marketing organization?

- A. Not at all aligned, everyone is focused on their own tasks
- B. Slightly aligned, we sync regularly and keep one another informed
- C. Mostly aligned, our email, mobile and web teams work closely on campaigns
- D. Highly aligned, every team is highly integrated with a documented process

**Tally up your responses, and read on for your results!**

A: \_\_\_\_\_  
B: \_\_\_\_\_  
C: \_\_\_\_\_  
D: \_\_\_\_\_

# Survey Says...

## ○ Mostly As: Single-Channel

### You're just getting started!

At this stage, you're likely focused on just one type of interaction with customers using a single channel. For most marketers, this focus is likely on email marketing, in which they're mass-blasting to their entire audience.

However, this can also apply to brick-and-mortar stores with little online presence or gaming apps that communicate exclusively on mobile.

Regardless of preferred channel, your next step is expanding your reach outward for increased engagement.

### Your Action Plan

- ✓ Identify how adding multiple channels would influence your marketing strategy and which would deliver the highest ROI.
- ✓ Develop multi-step messaging campaigns for each part of the customer lifecycle, from click to cash.
- ✓ Build out your subscriber profiles with demographic, behavioral and event data to improve personalization.

## ○○ Mostly Bs: Multi-Channel

### You're on the right track!

Your customers can engage with your brand using various channels across multiple devices. However, it's likely that these channels are managed by different teams and each operates independently of the others.

Because of this, customer data is extensive but scattered. This is especially common in large organizations that are responsible for many brands or business units.

Now is the time to coordinate all channels to achieve a more cohesive customer experience.

### Your Action Plan

- ✓ Test, test, test—not only the messages within a channel, but also which channel performs better.
- ✓ Prevent ineffective communication caused by marketing misalignment by coordinating the messaging efforts of all teams.
- ✓ Evaluate the health of your customer data by identifying how it is siloed, cleansing any inconsistencies, and filling in gaps of information.

# Survey Says...

## ☿ Mostly Cs: Cross-Channel

### You're almost there!

Not only can consumers interact with your brand on multiple channels, they receive a consistent experience across most of them. Customer data may still exist in silos, but your team is aligned with others in your organization to coordinate messaging.

The trick now is to achieve the “omni” in omni-channel. Are there channels you have yet to adopt, like web push notifications or direct mail?

Don't leave any stones unturned as you strive to create an ubiquitous brand presence.

### Your Action Plan

- ☑ Automate your efforts by ensuring that all messaging workflows are triggered off of individual user actions, such as adding an item to a wish list.
- ☑ Ensure that you're responding to customers in real-time by reducing dependencies on technical resources or professional services.
- ☑ Eliminate data silos by integrating all first- and third-party sources into a single, unified platform for a 360° customer view.

## ☿ Mostly Ds: Truly Omni-Channel

### You're on fire!

You've reached marketing nirvana: all customer experiences are seamlessly orchestrated across all online and offline channels. You're no longer talking at your subscribers; you're talking with them.

The irony is that once you've achieved omni-channel relevance, your marketing strategy is no longer channel-specific: it's customer-specific.

When you're reaching the right people at the right time, wherever they are, that's when the real magic happens.

### Your Action Plan

- ☑ Focus on facilitating 1:1 conversations in a systematic fashion, regardless of marketing channel.
- ☑ Turn your attention to dramatically increasing the ROI of your marketing tactics by optimizing the performance of each channel.
- ☑ *Pat yourself on the back! You've earned it!*

# True Omni-Channel Marketing Takes the Right Technology





Now that you know the state of your marketing strategy and your action plan to forge ahead, it's important to note that you need the right equipment to enable an omni-channel brand experience.

Multiple point solutions for email, direct mail, mobile, web, social and more are only going to get you so far—to successfully orchestrate a superior customer experience, all data must be ingested in a single platform and integrated together for a unified view.

It can be challenging to achieve omni-channel relevance, but the good news is that you don't have to go at it alone. By using the best solution for your business, you'll be set up for success!

## The tenets of truly omni-channel technology:

- Sophisticated, dynamic segmentation
- Intelligent, automated campaigns across all channels
- Behavior-based personalization using unlimited data sources

	 SINGLE-CHANNEL	 MULTI-CHANNEL	 CROSS-CHANNEL	 OMNI-CHANNEL
Automation	All campaigns are manually deployed	Transactional messages are automated	Lifecycle campaigns are behaviorally triggered	All campaigns are triggered by individual behavior
Segmentation	All messages are sent to entire subscriber list	Customers are segmented by demographic data	Customers are segmented by behavioral data	Customers are segmented by individual data
Personalization	All customers receive the same messaging	Messaging is dynamic based on profile info	Messaging is dynamic based on customer interests	Messaging is dynamic based on customer actions
Organizational Alignment	Teams operate independently of each other	Teams keep each other informed of campaigns	Teams often collaborate on campaigns	Documented process aligns all teams
Testing	Campaign or message testing is nonexistent	Testing is ad-hoc and typically limited to copy	Testing of copy and creative occurs regularly	Testing is systematic across all channels
Response Time	Response is delayed or non-existent	Delayed response, within weeks	Near-real time response, within days	Real-time response, within minutes
Channels	Primarily one	Between 2 and 5	Between 6 and 10	More than 10

# About Iterable

Iterable is the growth marketing platform that powers personalized omni-channel marketing at scale. Iterable captivates consumers with highly relevant and personalized messaging, activates campaigns on any type of internal and external customer data, and allows marketers to automate campaigns across all channels that matter to their consumer.

Marketers can use Iterable to quickly and intuitively build customer segments, build workflows, automate touch points, and test strategies at scale without engineering support.



## Modern Architecture

Iterable is built with industry-leading Elasticsearch technology. Onboard unlimited data, segment on real-time behaviors, personalize your message at scale and deliver to millions across multiple channels.



## True Omni-Channel

Amplify your messaging resonance at enterprise scale with a personalized, true omni-channel experience across email, mobile, direct mail, web and social.



## 1-to-1 Relevance

Enhance message relevance by leveraging dynamic subscriber demographics, behavioral and event data in real time. Create triggered and event-based campaigns.



## Single Data Platform

Ingest unlimited data from any platform, including commerce, service and data providers. Understand your customers' actions while reducing data silos.



## Workflow Studio

Iterable's highly visual, drag-and-drop workflow builder triggers campaigns with an unlimited number of steps, branching and A/B tests.



## Easy to Use

Iterable is built for marketers, who can now create sophisticated campaigns without technical resources. Use one platform to plan, execute and manage omni-channel campaigns.

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