

7 Tips for Getting Started with Behavioral Marketing

With new technology, channels and tactics available for interacting with customers and prospects, marketing is an ever-evolving discipline. Savvy marketers are using the latest iterations of these changes to power sales lift and better customer experiences across the entire spectrum.

There's a relatively simple concept behind much of this improvement: what someone DOES is critically important in deciding how to reach (and convince) him or her most effectively. An individual's behaviors represent incredible moments of insight for the marketer savvy enough to listen closely and act on that information.

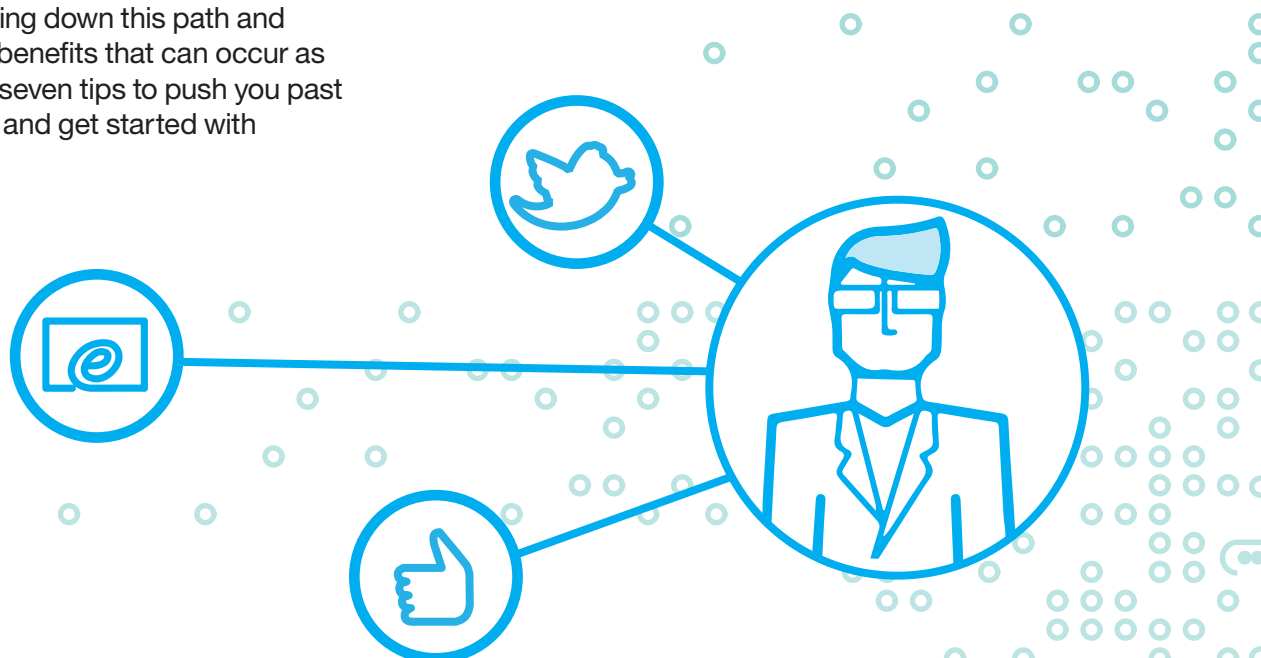
When you employ behavioral marketing — using these behaviors to trigger unique interactions with an individual — the customer focus it encourages and the revenue lift it creates are the basic underpinnings of epic improvement.

For many marketers, though, the prospect of implementing behavioral marketing initiatives presents challenges and uncertainties that prevent them from going down this path and realizing the massive benefits that can occur as a result. Follow these seven tips to push you past your initial trepidation and get started with behavioral marketing.

1 Avoid becoming overwhelmed.

With so many customer behaviors occurring virtually every second of every day, the prospect of overhauling your existing processes so you can attempt to serve up the ideal piece of content at the perfect time for each contact in your database can be daunting. The good news is that because there's an entire spectrum of how deeply you can accept behavioral marketing into your marketing practice, you can spread your improvements over time and make measured, positive change.

As you begin (or accelerate) your behavioral marketing implementation, think about scaling change into your marketing group. Being more behavioral-driven doesn't mean you have to re-engineer every marketing practice on one random Tuesday. You only have to make minimal changes to show strong revenue growth potential that pays off even more as you add additional segmentation strategies and automated programs. The key is to start thinking of behaviors as the new lens for how you look at your entire marketing effort.



2 Evaluate where you are now.

Look at your marketing on two specific axes: today's success rate and how personalized you are. Tackle channels one at a time, and once you've honestly assessed your current results — and for most a 1-10 scale is the most relevant measuring stick — then take an equally critical look at your personalization. Again, assigning yourself a 1-10 score is probably a great way to quantify your current and future state. The litmus test here should be how many microsegments you're actively marketing to.

At the end of the process, you'll have a channel-by-channel scorecard for your efforts. While it might not be something as complex as you'd assemble for your customer-facing efforts, having a quantified measure of your "now" state is an important early step in the behavioral marketing process — and allows you to measure improvement over time.

3 Assess and upgrade your technology stack.

There are many ways to reorient a company around behavioral marketing — but one of the most critical moments often involves either new or upgraded technology that comes into the marketer's area of responsibility. Many times, that early-stage email platform your predecessor bought simply runs out of steam as your lists become bigger and your desires become more behavioral.

If it's time to upgrade, you need to be marketing's No. 1 advocate for highly usable SaaS-based technologies. Spend time getting to know peers in your industry and understand which vendors have rock-solid solutions for your common use cases. Build ROI cases based on data from industry analysts and comparable customer case studies. Just remember: leaving these tasks to others in your organization — particularly IT — could be a recipe for disaster.

4 Assemble the right team.

When thinking about reorienting your efforts around behavioral marketing, it's critical to understand that it can effectively occur at every level — from the CMO to

the specialist. Of course, your success will be more institutional the higher the thinking rises — but don't think a single manager can't make a huge difference.

Behavioral marketing really is a mix of art and science. We can use our creative brains to model out critical customer journeys, leverage scientific methods to track and assess specific events within those journeys, and then circle back to our creative prowess to deliver the most compelling message at the right time.

This is why you'll typically see the most effective marketing groups blending the two skills together almost seamlessly. If you're hiring, then, seek out candidates with these attributes and index for potential, personality and grittiness. If you're further down in your organization, be a catalyst for change — the market is moving toward more quantified, personalized buying experiences, and building your competency now will pay dividends for your future.



Hiring and Mentoring Great Behavioral Marketers

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5 Begin tracking and segmenting your audience based on website behaviors.

Now you're ready to really start diving into behavioral marketing. For most companies, an excellent starting point will be to begin capturing the behaviors of visitors to your site so you can link these actions to known users (and tie behaviors to previously anonymous visitors if they identify themselves at a future date).

Initially, this will require you to work with IT to install the JavaScript tracking code. This one-time effort opens up a critical customer-level view of behaviors that should flow directly into your marketing automation platform and become elements you can query on immediately.

6 Employ the “Next Six” methodology.

So, how can you reframe your marketing to be more behavioral-driven — all while continuing to execute the tasks and campaigns you’re currently working on? One of the best ways to make this change part of your program over time is to improve in smaller chunks, typically in groups of three — execution mode on three, and planning mode on the next three — during a specified period of time (like a quarter).

The brilliance of this simpler view of change is that you only have to architect changes in groups of three to support a larger change initiative. And if you tackle three of these per quarter, you can absolutely remake your marketing approach in the course of 12 to 18 months.

If you’re getting good at architecting and delivering this change, then the next step will be to add a third element — a true moonshot list that might include something as aggressive as a new CRM tool. Think about giving yourself a year or longer horizon to tackle these big efforts, but make sure to remain constructively dissatisfied with your current state and always be moving forward.

Take the time to fully articulate your future state at 12, 18 and 24 months. Be very specific about what capabilities you’d like to have, and then back into the changes required to get there.

7 Pick three key behavior-driven automated programs to build and launch.

To get your behavioral marketing journey off to an auspicious beginning, consider focusing on these three specific programs, which will yield strong returns for most businesses:

- **Cart or process abandonment:** In many cases, a multipart series (three is again a common number) will yield the best results. Spend some serious thought time on the pace and content of each of the three messages. The first should typically be within 30 minutes of abandon, the second should come the next day and perhaps feature an offer, and the final should happen roughly two days later and make your absolute best case for the purchase, trial download, etc.
- **Browse abandonment:** Once a named user visits one or more specific product pages in a category on your site, your browse abandonment program could automatically trigger a message featuring the best sellers in the category, and potentially include an offer. By playing back

Solidifying a Single Customer View

As you look to grow more sophisticated in your behavioral marketing, enhancing your customer view across channels, platforms and systems should be a key area of focus. To that end, your marketing automation platform can serve as your global unique identifier, a way to look across your technology stack and better understand who each member of your database is.

To solidify your customer view, consider all the places you’d like to generate customer touches — email, website, in-store, help desk, direct mail, mobile app, SMS, social and more. Do you have the internal and external integrations in place to understand what each individual does via these mediums? CRM, order management, shopping cart, call center and ERP systems are all excellent candidates for integration.

When you have systems in place that capture these events and map them back to individuals in your database, you’ll be well-positioned to expand your use of behavioral marketing and modify your outbound marketing based on what you know about that person and the actions they’ve taken.

content you know the person is interested in, you subtly reinforce that you're paying attention — driving the personalization quotient through the roof.

- **Welcome campaign:** A comprehensive, well-orchestrated welcome process can create an instantly deeper bond with a recipient. A retailer, for example, might begin a welcome series with a simple thank-you message, move on to content about both its online and retail stores, and close with an offer designed to drive the first purchase event. Keep it personal, light and informative and you'll build a quick rapport with new customers — which often leads to more profitability down the road.

As you continue implementing more behavioral marketing tactics, you may have to chart a course that's unique to your industry and business, but remember that rarely do bad things happen when

you're relentlessly moving forward. Be thoughtful and realistic, but don't hold back.



Becoming a More Progressive Behavioral Marketer

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