

# WHMA

## DIGITAL PLATFORM DEVELOPMENT

A REALISTIC APPROACH TO DIGITAL  
TRANSFORMATION

FEBRUARY 20, 2015

# INTRODUCTION

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ABOUT ME AND THE COMPANY I WORK FOR

# WHO IS THIS GUY?



- Sean Rusinko
- Head of Digital Strategy at Verndale
- Passionate about Experience Technology & Marketing Transformation
- @seanrus
- @verndaletweets



Award-winning  
XT Company



Boston HQ  
with  
Global Delivery  
Model



Diverse  
Client  
Portfolio



Extensive CMS, Experience  
Management, eCommerce and  
Marketing Automation Partnerships

# WHAT IS EXPERIENCE TECHNOLOGY?

## DISCOVER

Strategic Planning,  
Digital Maturity  
Campaigns (DMCs)  
& CXM Consulting

## DESIGN

Content Strategy,  
Experience Architecture,  
Experience Design

## EVALUATE

Measurement and analytics  
are essential for staying on  
the front edge of marketing  
evolution

## BUILD

Platforms, system health  
analysis, testing, and deep  
coding skills



# WHAT WE'LL COVER THIS MORNING...

1. Market Trends
2. Digital Maturity & Transformation
3. In-market Maturity Examples
4. Guiding Principles for Transformation
5. Q&A

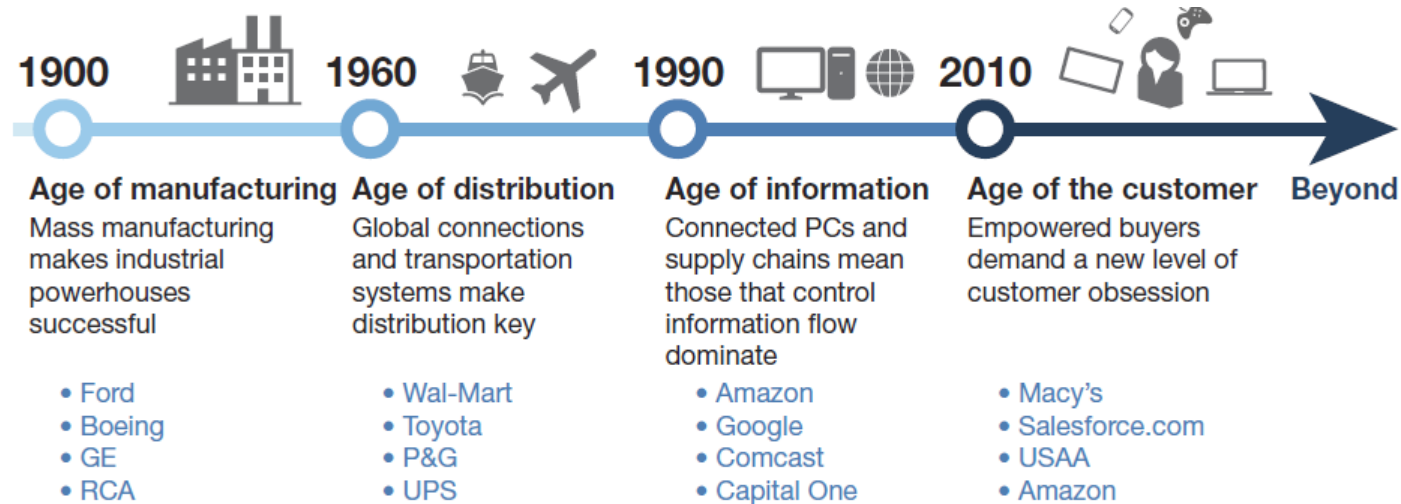
# 1. MARKET TRENDS

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USER BEHAVIOR, TECHNOLOGY EVOLUTION &  
MARKETING INNOVATION

# WE HAVE ENTERED THE 'AGE OF THE CUSTOMER'

A 20-year business cycle in which the most successful enterprises will reinvent themselves to systematically understand and serve increasingly powerful customers.



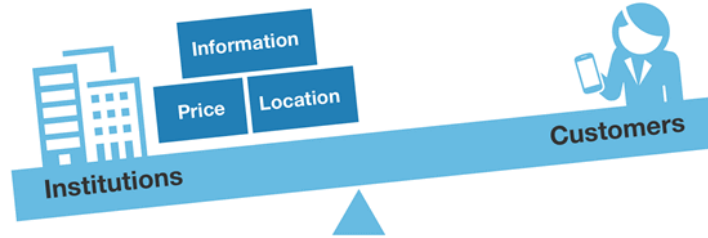
Source: Forrester, 2014



# TECHNOLOGY HAS TIPPED THE BALANCE

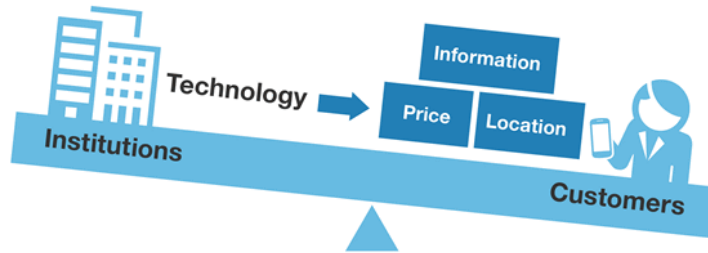
Once, Technology  
Favored Companies;

BEFORE



Now, It Empowers  
Customers

NOW

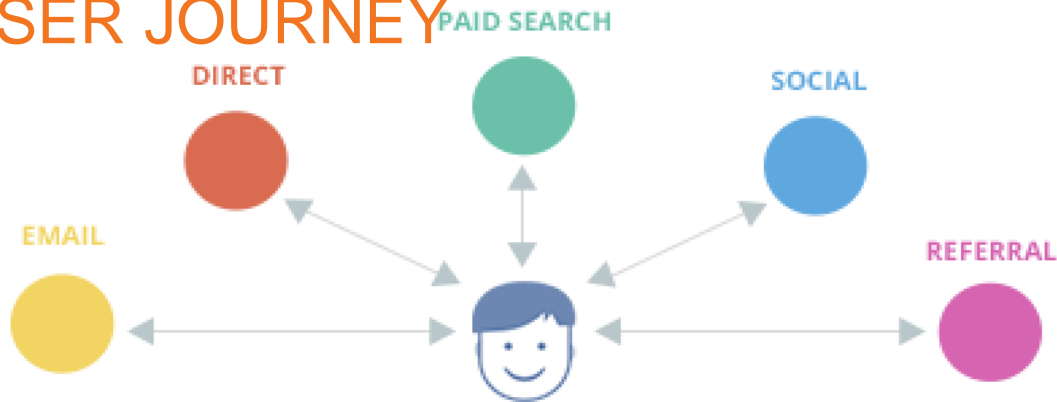


The Customer  
Experience (CX)  
Should Be at the  
Center of Your Digital  
Marketing Strategy

A DECADE AGO, IT WAS MUCH SIMPLER



# MORE TOUCH POINTS + MORE CONSUMPTION = MORE COMPLEX USER JOURNEY



ASSIST

LAST INTERACTION





## MOST VISITED WEBSITES IN THE U.S. (ALEXA)

While we love the tech giants for their innovation, they have dramatically raised the expectations of your users, therefore creating a challenge.



WIKIPEDIA  
The Free Encyclopedia



# TECH GIANT EXAMPLE: GOOGLE

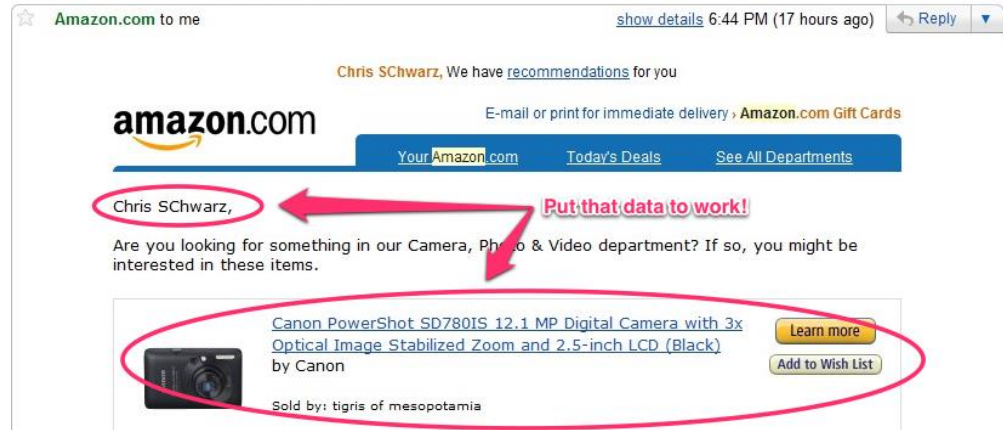


- Pioneered personalization
- Data monster: knows more about you than NSA
- Google Now
- Keep it simple design
- “Don’t be evil”



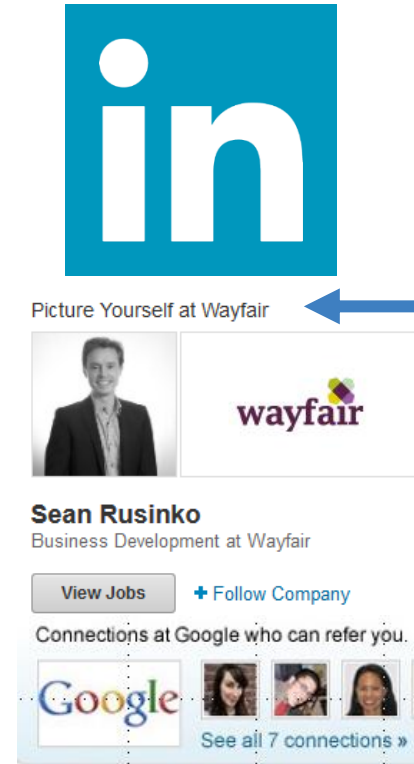
# TECH GIANT EXAMPLE: AMAZON

- Customer-centric company
- Pioneered user reviews
- Personalization machine
- One-click buying



# TECH GIANT EXAMPLE

- Leverage human connections and endorsements to build trust
- Pioneered progressive profiling & profile completion %
- Sophisticated marketing automation



# TECH GIANT EXAMPLE

- Bridged personal offline experience with online experience
- Increased engagement through personalized mobile interaction
- Mass consumption of data to improve business – constant iteration



U B E R

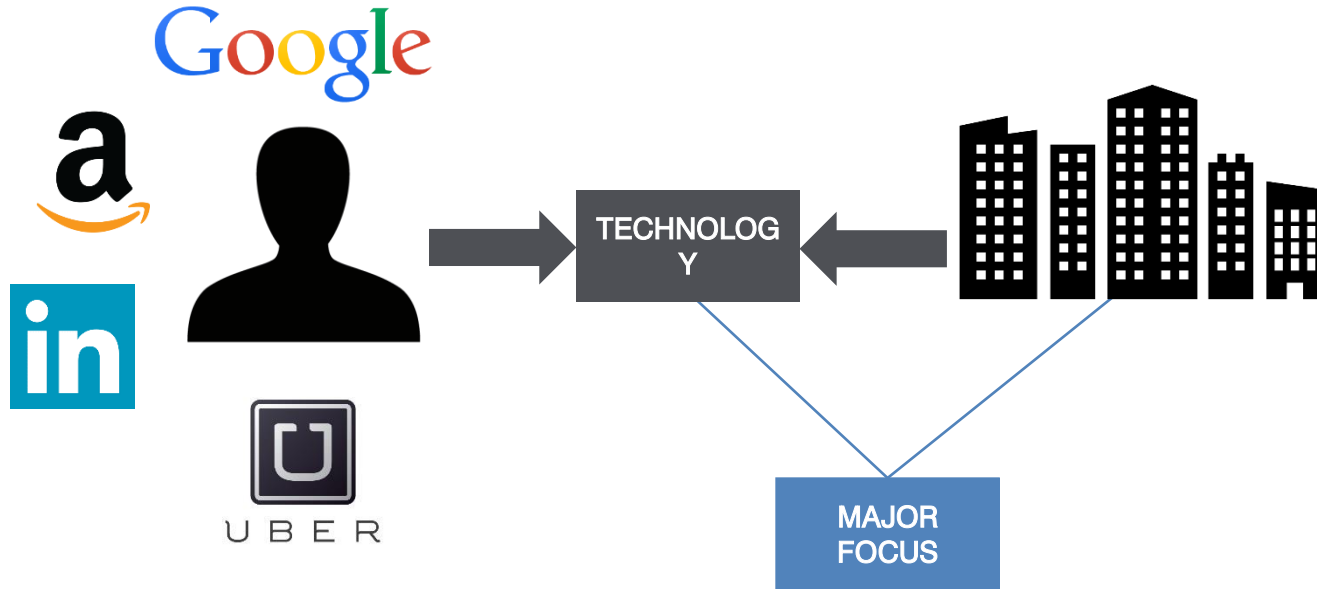






Because of the tech giants, users are expecting a more tailored, end-to-end experience across the board.

# COMPANIES ARE COMPETING FOR EMPOWERED CUSTOMERS

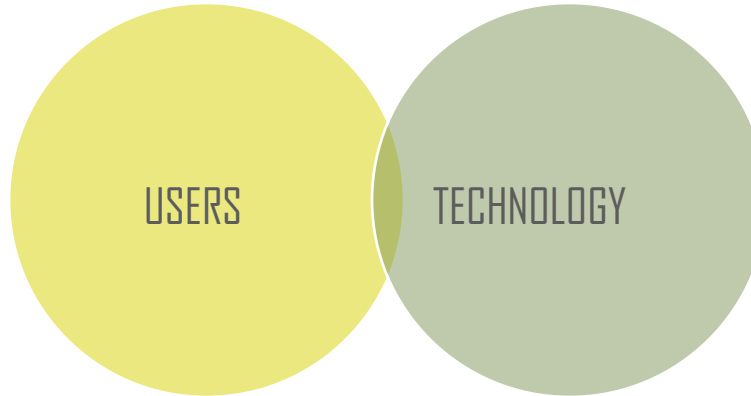


# MARKETING + TECHNOLOGY = HAPPY USERS

USERS EXPECT A SEEMLESS, INTEGRATED EXPERIENCE THAT LEADING TECHNOLOGY ENABLES TODAY.

## *Today's User...*

- Consumes More
- Commits Less
- Demands Efficiency
- Expects It Across Device

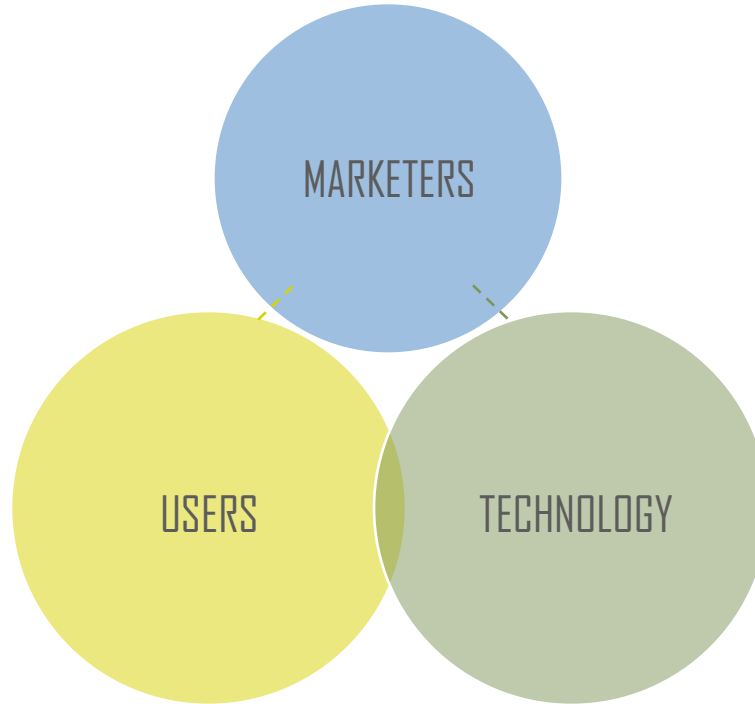


## *Today's Technology...*

- Scales Easily
- Learns About Users
- Integrates More
- Adapts to Device

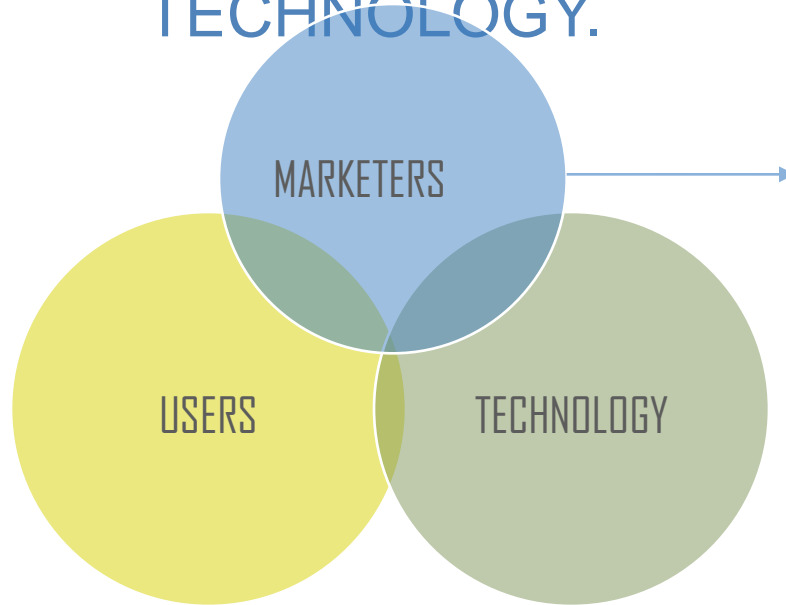
# MARKETING + TECHNOLOGY = HAPPY USERS

*Today's  
marketer  
struggles to  
connect the  
two*



# MARKETING + TECHNOLOGY = HAPPY USERS

MARKETERS MUST RE-STRATEGIZE & EMBRACE TECHNOLOGY.



Today's Marketer **MUST**...

- Produce More
- Progressively Profile
- Personalize Content
- Streamline the Experience

# TRENDS

By 2020, customers will manage 85% of their relationship without talking to a human.

(Gartner Research)

A whopping 68% of B2B organizations have not identified their funnel.

(MarketingSherpa)

64% of CMOs have either an informal or no process to manage their marketing automation

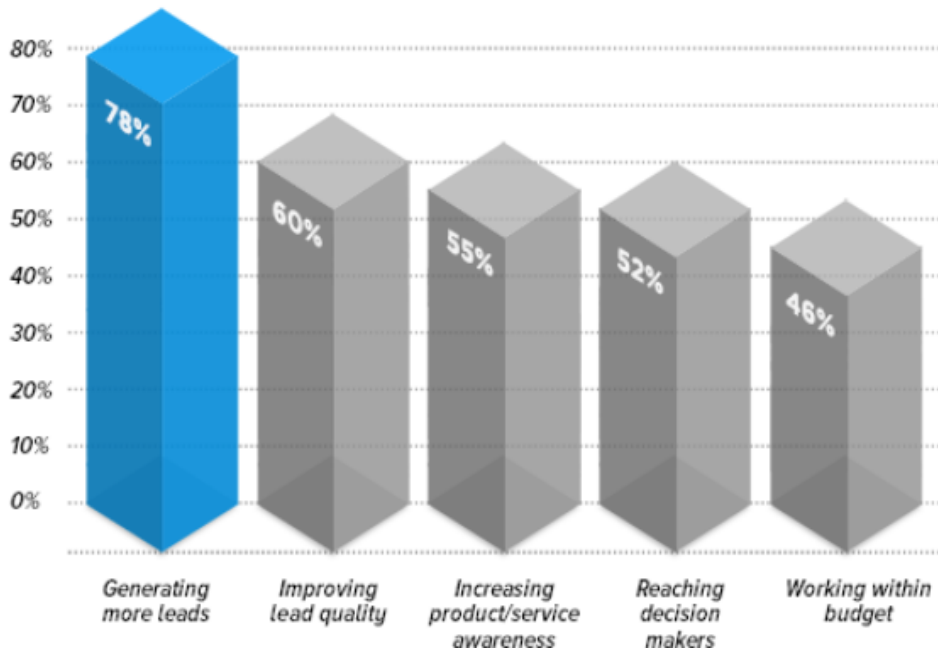
(Forrester)

Spending on marketing analytics is expected to increase 60% by 2015.

(CMO Survey)

# BEST METHODS FOR FINDING B2B CUSTOMERS

A recent study showed that generating more leads is the biggest challenge B2B marketers are facing.



# WHICH B2B LEAD GENERATION METHODS WORK BEST?

Content, Demand Generation and Email Nurturing Top the List

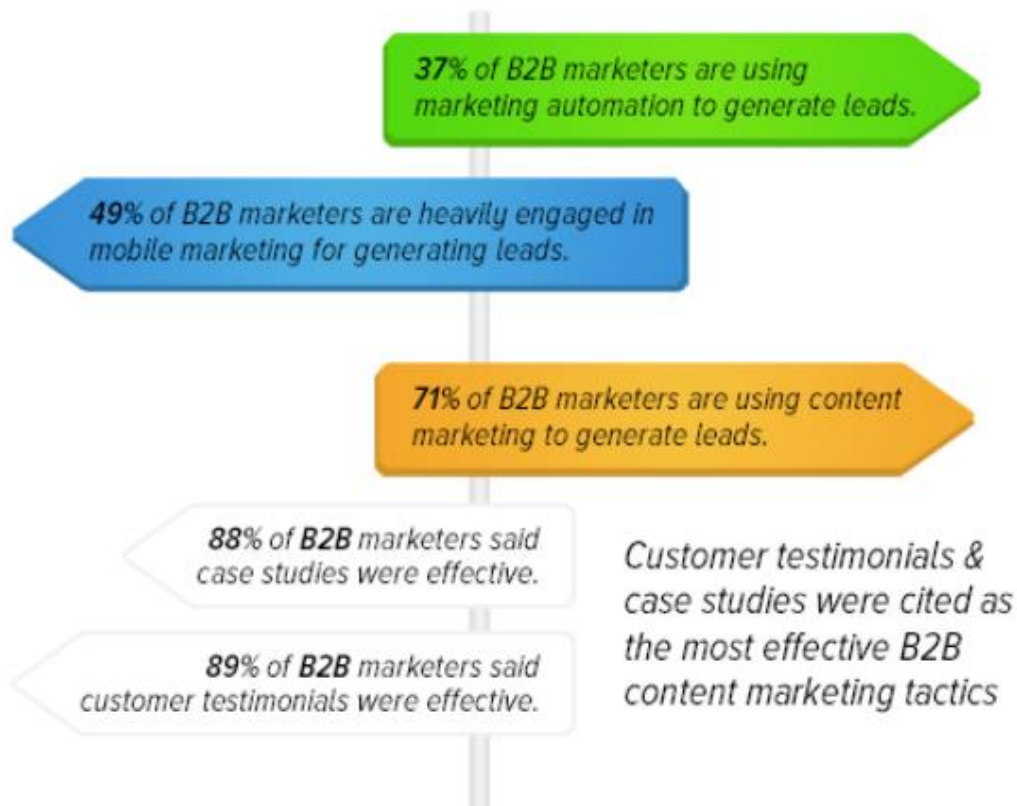




# EMERGING TRENDS IN B2B DIGITAL STRATEGY

Marketing Automation, Mobile, and Content Marketing – they all go hand-in-hand

## EMERGING TRENDS

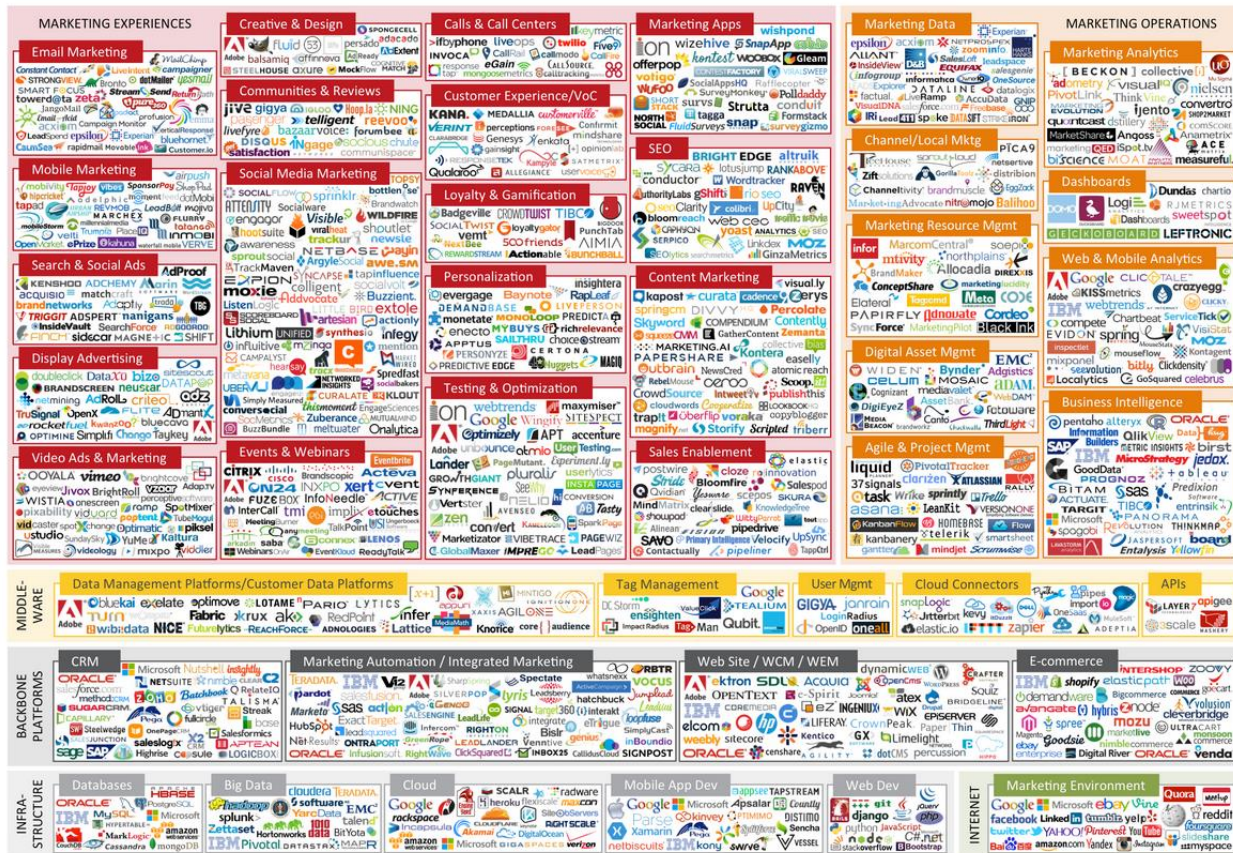


*“Five Years From Now, CMOs Will Spend  
More on IT Than CIOs Do.”*

Gartner, 2012



JUST A FEW DIGITAL  
TECHNOLOGIES TO  
CHOOSE FROM...



by Scott Brinker @chiefmartec <http://chiefmartec.com>

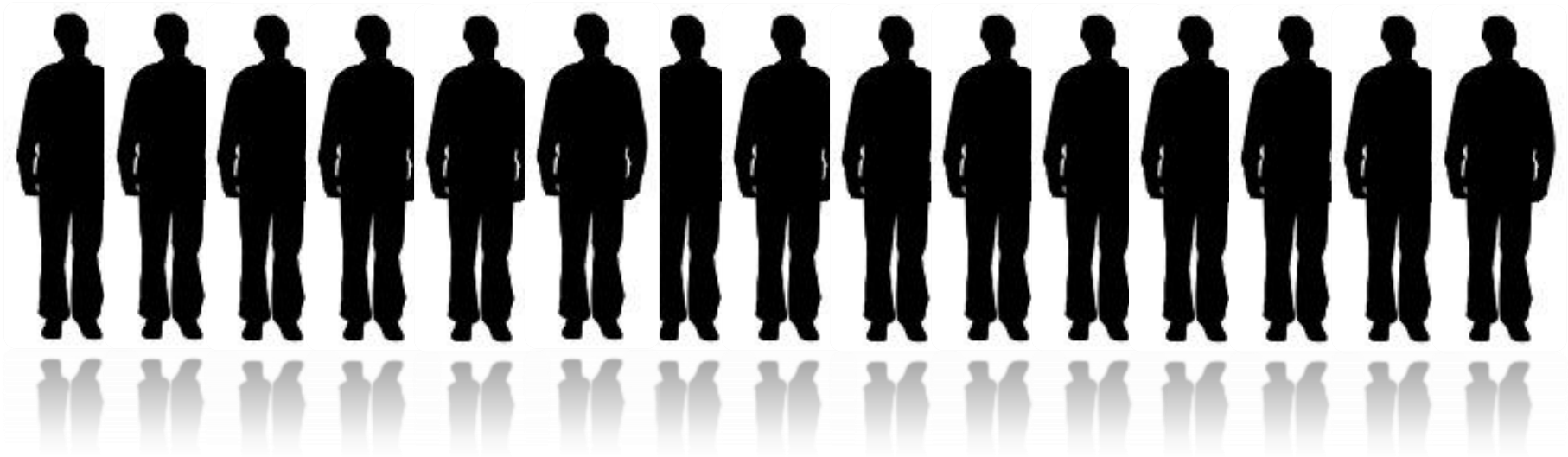
# CONNECTING THE EXPERIENCE THROUGH CXM

## THE PROMISE OF XM

- Leverage cross-channel **data** for targeted content
- **Personalized** experiences across touchpoints and journey phases
- **Scalable** platform for sustainable investment



# YOUR CUSTOMERS



# YOUR CUSTOMERS

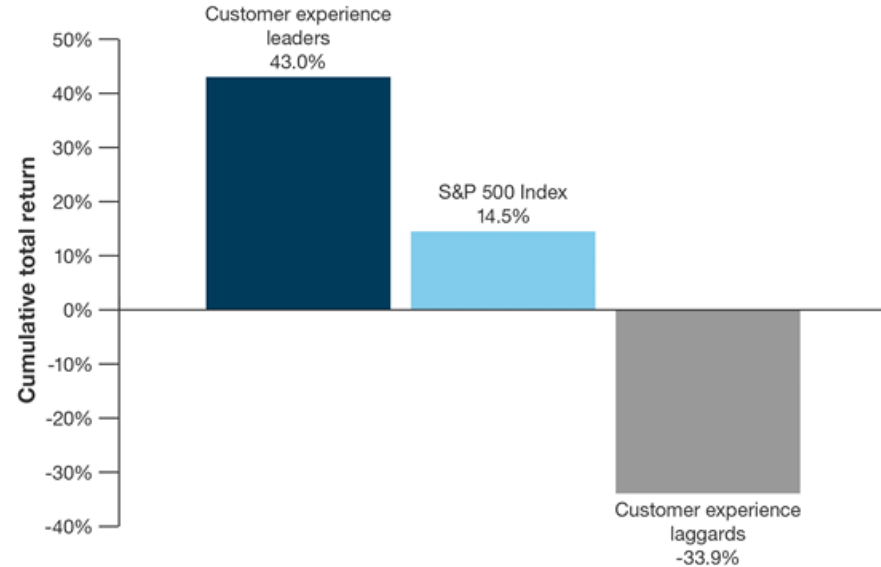




# CX LEADERS GENERATE HIGHER ROI

Harnessing Customer  
Experience  
Management  
Solutions Is Now a  
Do-or-Die Decision for  
Many Enterprises

6-year stock performance of customer experience  
leaders versus laggards versus S&P 500 (2007 to 2012)



Source: Forrester Research and Watermark Consulting

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Source: Forrester Research, Inc. Unauthorized reproduction or distribution prohibited.

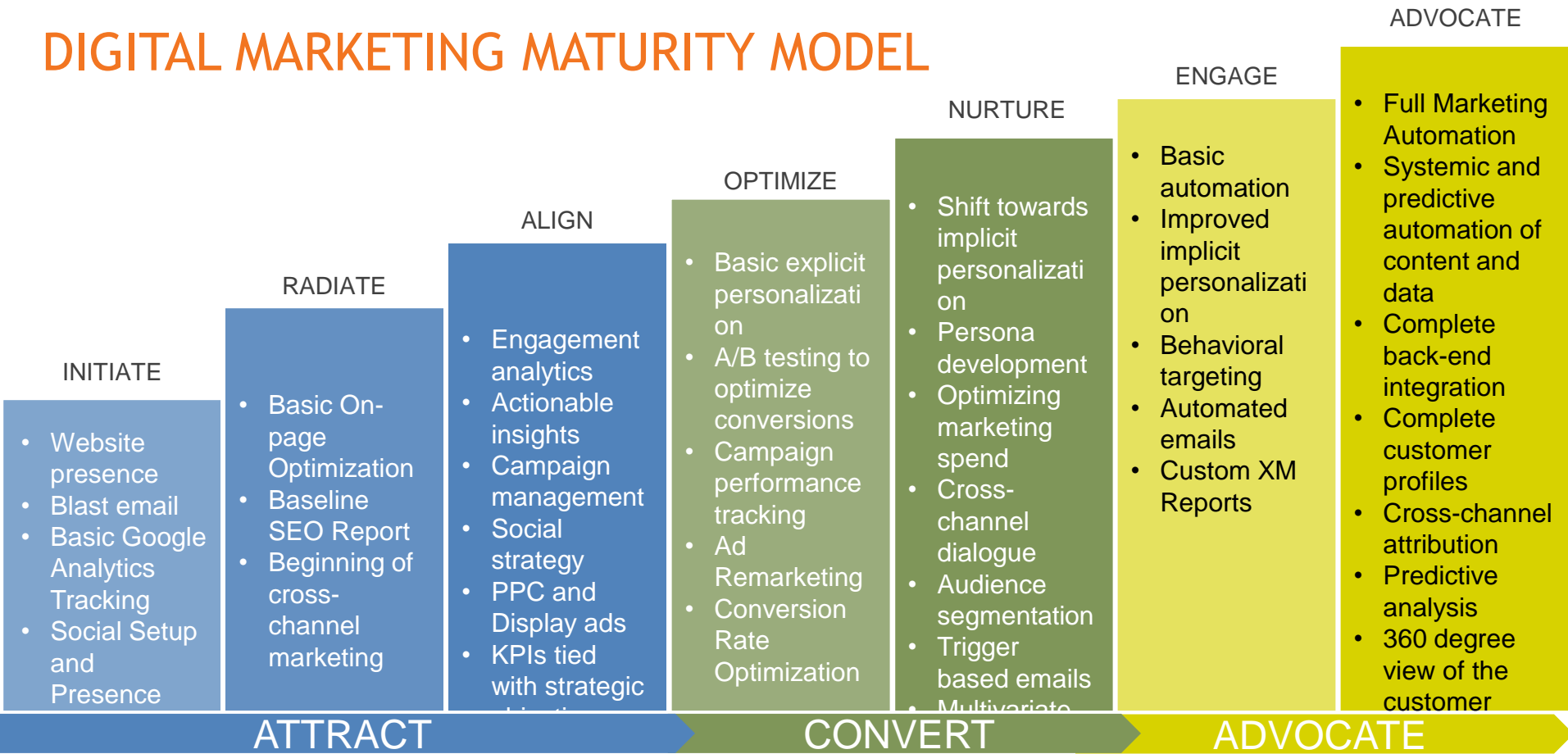
## 2. DIGITAL MATURITY & TRANSFORMATION

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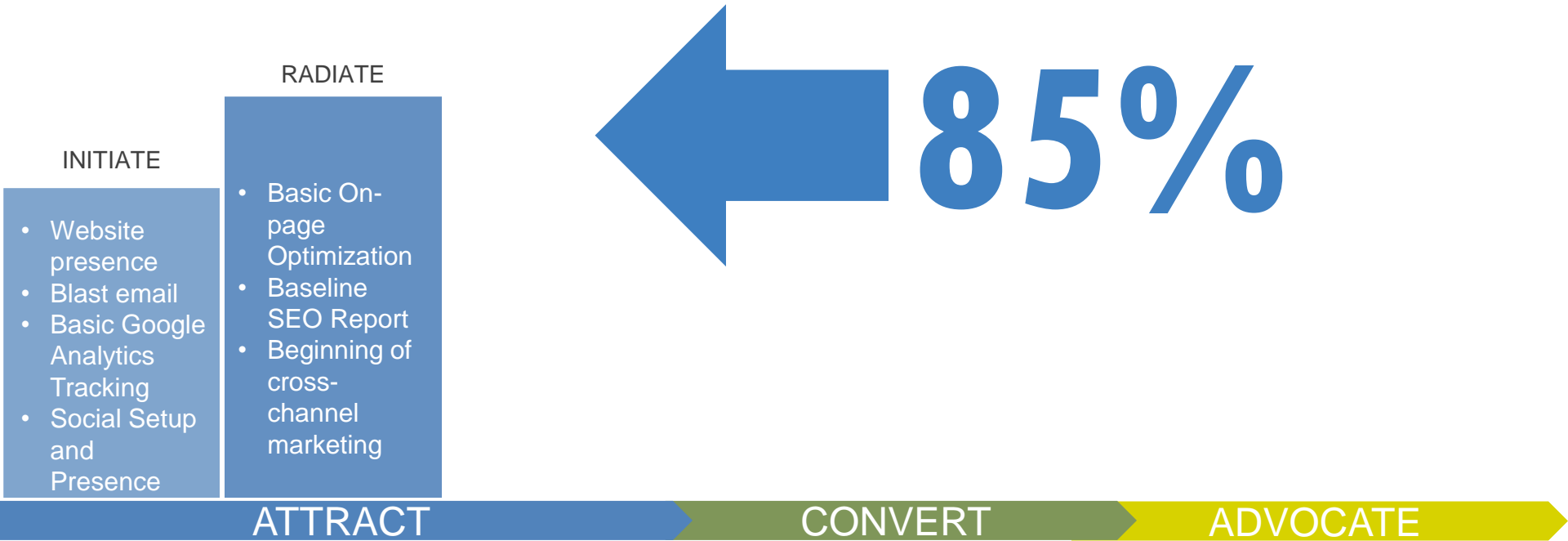
### HOW TO APPROACH DIGITAL TRANSFORMATION



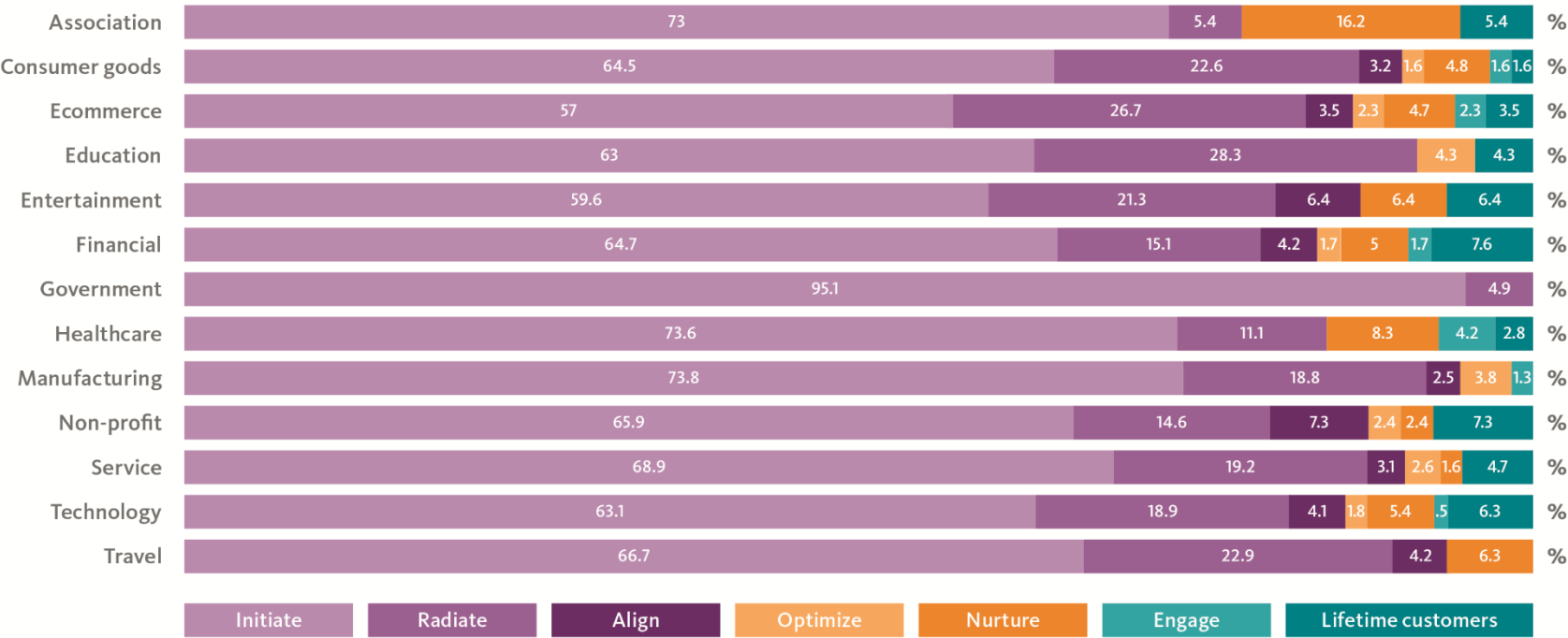
# DIGITAL MARKETING MATURITY MODEL



# DIGITAL MARKETING MATURITY MODEL



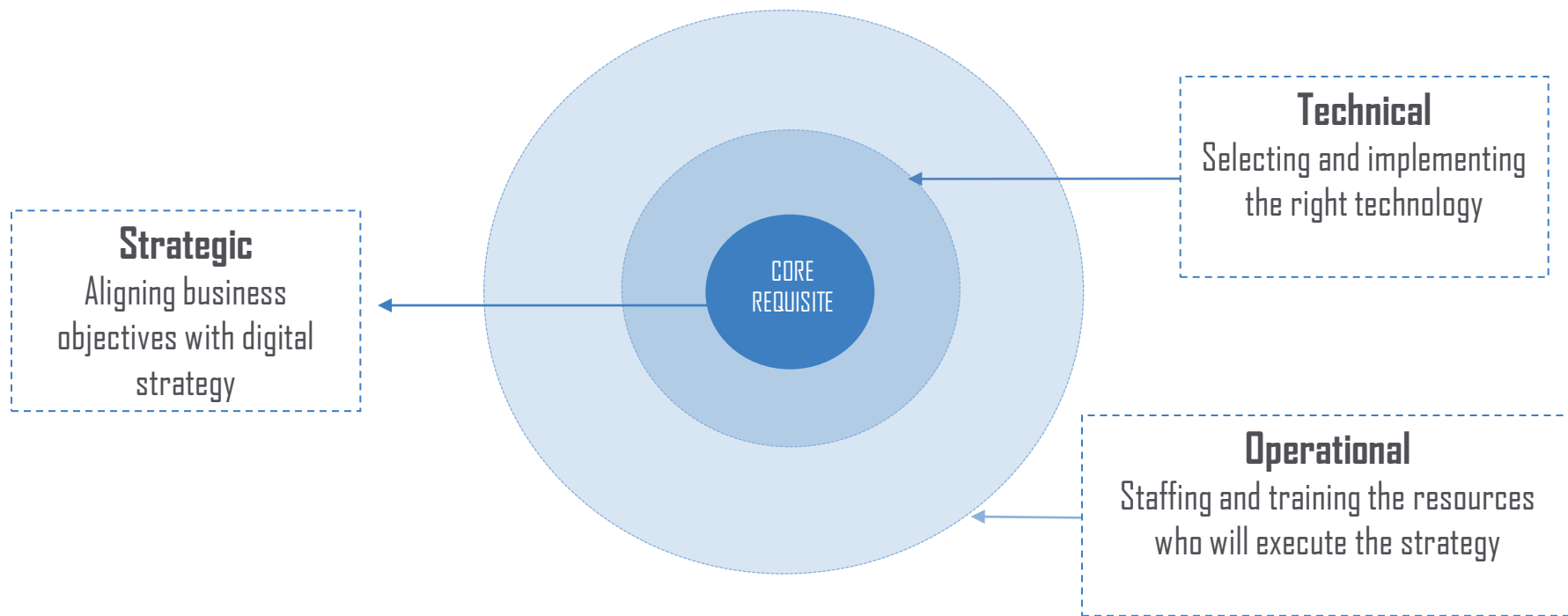
# MATURITY BY INDUSTRY



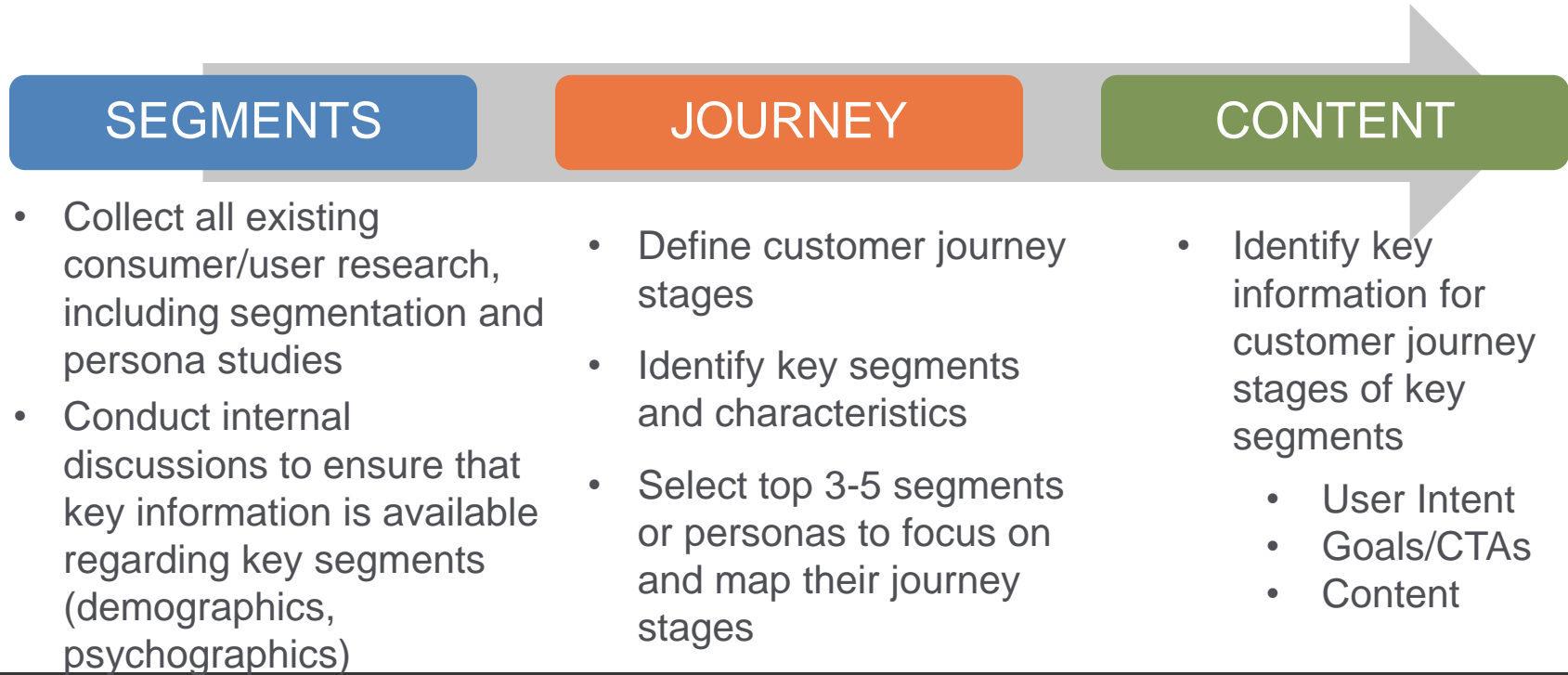
*Why aren't marketers moving past the first two phases?*

*Where are the pitfalls when trying to execute on Digital?*

# TRANSFORMATION READINESS



# STRATEGIC PLANNING PROCESS



# KEY SEGMENT/PERSONAS WORKSHEET

Segment / Persona	Demographics	Psycho-graphics	Key Customer Goals/Intent	Products / Services Desired
Segment 1	•	•	•	•
Segment 2	•	•	•	•
Segment 3	•	•	•	•

# USER JOURNEY PHASES



Customer Journey Phase	Description
Awareness	Brief Description
Consideration	Brief Description
Intent	Brief Description
Purchase	Brief Description
Advocate	Brief Description



# SEGMENT & JOURNEY CONTENT MAPPING

Segment: Traditionalist	Customer Journey Stages				
	Awareness	Consideration	Intent	Purchase	Advocate
Customer Intent					
CTAs / Goals					
Persuasive Content					

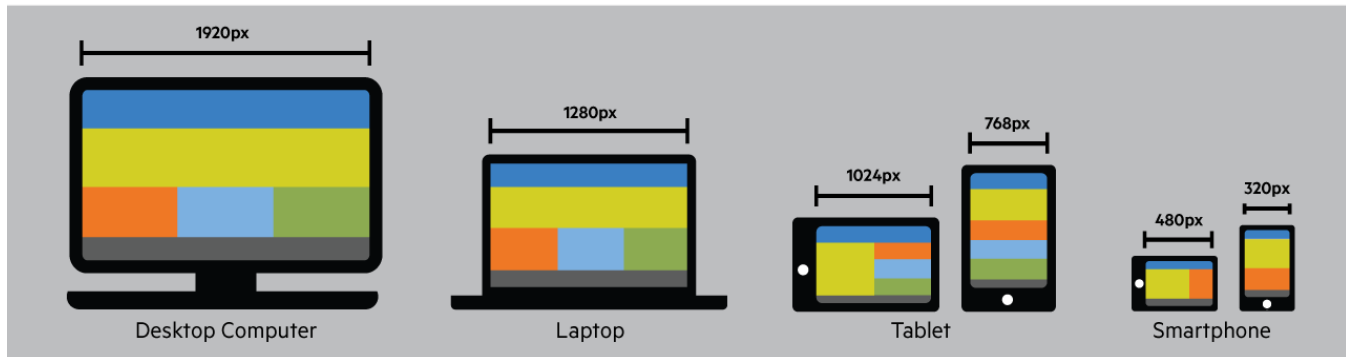
# XM STRATEGIC PLANNING PROCESS

## Drivers for Responsive:

- Similar user intent across devices
- Base content & feature set across breakpoints
- One codebase for development & management

### What is Responsive Design?

Responsive design allows a website to **respond** to the device that it is being viewed on.



### Why do you need it?



Customize the user experience



All pages render on all devices



No zooming necessary

# ROADMAP

Business Objectives

User Segments

XD & Content

Roadmap

## RELEASE 1 – 12MO

- Responsive Redesign
- XM Integration
- Personalized Calls-to-action
- Product Recommendations
- Testing/Optimization

## RELEASE 2 – 18MO

- Advanced Multivariate Testing
- Advanced Personalization
- Channel Optimization
- Enhanced Mobile Uses - Virtualization

## RELEASE 3 – 24MO

- Automation
- Business Intelligence (BI) Reporting
- Offline>Online Channel Optimization
- Gamification
- 3d Printing
- Host the site on Mars

# SELECTING THE RIGHT TECHNOLOGY

Sean to add content

# SELECTING THE RIGHT TECHNOLOGY

Sean to add content

# OPERATIONAL READINESS

Digital marketers are responsible for **monitoring** engagement analytics, **optimizing** and evolving customer engagement, and **socializing** results internally to gain buy-in and garner feedback.



# OPERATIONAL READINESS - DISCIPLINES TO HIRE FOR

Sean to add content

# PAVING THE PATH FORWARD

Sean to add content



# IN-INDUSTRY EXAMPLES

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## CURRENT STATE AND QUICK WINS EXAMPLES

# WHMA QUICK WIN EXAMPLE 1

Sean to add content

## WHMA QUICK WIN EXAMPLE 2

Sean to add content

## WHMA QUICK WIN EXAMPLE 3

Sean to add content

## WHMA QUICK WIN EXAMPLE 4

Sean to add content

# GUIDING PRINCIPLES

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KEEP THESE TOP-OF-MIND WHEN YOU'RE PLANNING

USERS

FOCUS THE  
STRATEGY  
AROUND THE  
USER.



THINK BIG

BIG PICTURE  
PLANNING.

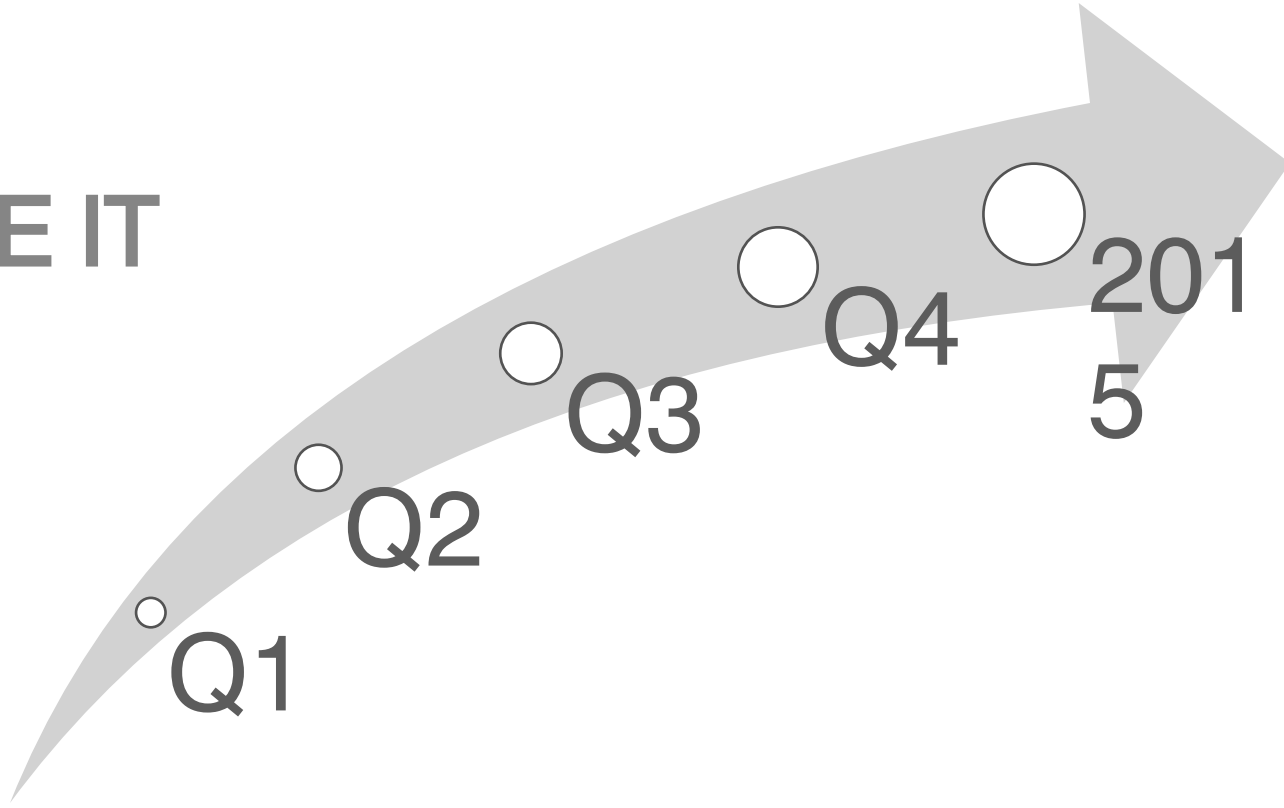
LONG-TERM  
STRATEGY.





# AGILE MARKETING

PHASE IT  
OUT.



# CHOOSE YOUR TECHNOLOGY WISELY

Sean to add content

# STRIVE TO BE SELF-SUSTAINING

Sean to add content

Q&A

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LET'S KEEP THE DIALOGUE GOING