Campaign Strategy - Our Competitive Advantages

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Business Target	CRM Strategy	Campaign Model	Campaign Research		Excellent Performance

Campaign Optimization

Customer Behavior Research (SAS, SPSS)

Campaign Model
- Customer Profiling
- Actionable Segments
- Campaign Response Model
- Targeted Marketing Strategy

Customer Attitudinal Research (SPSS)

Campaign Research
- Channel Sales Process Study
- Campaign Process Study
- Marketing Research
- Targeted Marketing Strategy

Optimized Campaign Communication

Campaign Optimization
- Website
- EDM
- SMS
- DM
- Tele-Marketing

Targeted Campaign Strategy

Measurable → • Size, purchasing power, profiles of segments can be measured.

Substantial → • Segments must be large or profitable enough to serve.

Accessible → • Segments can be effectively reached and served.
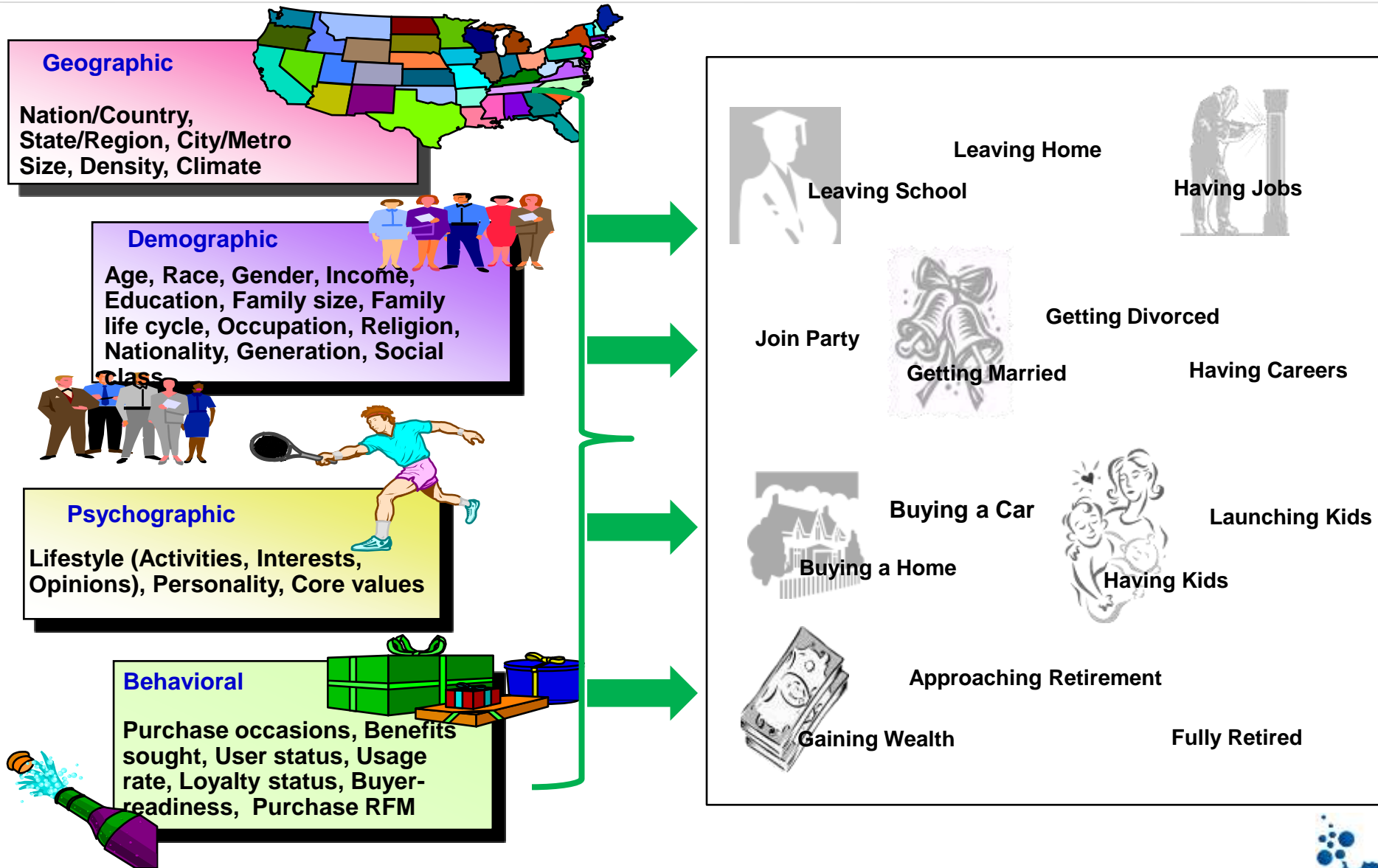
Differential → • Segments must respond differently to different marketing mix elements & actions.

Actionable → • Must be able to attract and serve the segments.

Campaign Strategy - Customer Segmentation for Targeted Marketing
(Transform Major Consumer Variables to Life Stage Segmentation)

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Geographic

Nation/Country, State/Region, City/Metro Size, Density, Climate

Demographic

Age, Race, Gender, Income, Education, Family size, Family life cycle, Occupation, Religion, Nationality, Generation, Social class

Psychographic

Lifestyle (Activities, Interests, Opinions), Personality, Core values

Behavioral

Purchase occasions, Benefits sought, User status, Usage rate, Loyalty status, Buyer-readiness, Purchase RFM

Leaving Home

Leaving School

Having Jobs

Getting Divorced

Join Party

Getting Married

Having Careers

Buying a Car

Launching Kids

Buying a Home

Having Kids

Approaching Retirement

Gaining Wealth

Fully Retired

Campaign Strategy - Customer Segmentation for Targeted Marketing
(Major Segmentation Variables for Business Markets)

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Firmographic
Industry
Company size
Location

Operating variable
Technology
User/nonuser status
Customer capabilities

Purchasing Factors
Purchasing RFM (Recency, Frequency, Monetary).
Purchasing function organization.
Power structure.
Nature of existing relationships.
General purchase policies.
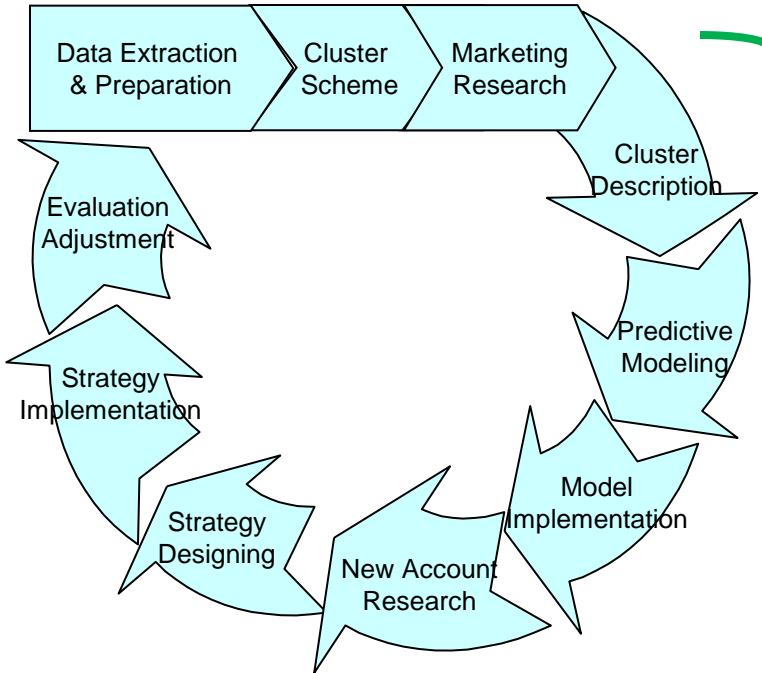Purchasing criteria.

Situational factors
Urgency
Specific application
Size of order.

Personal characteristics
Buyer-seller similarity
Attitudes toward risk
Loyalty.

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Project Methodology

Data Extraction & Preparation → Cluster Scheme → Marketing Research → Cluster Description → Predictive Modeling → Model Implementation → New Account Research → Strategy Designing → Strategy Implementation → Evaluation Adjustment

Customer Segment **Multinomial Logit (MNL)**

Business Objective & Model Objective

Business Objectives:
- **Drive revenue growth** through Targeted Marketing strategy implemented on different segments
- **Define actionable Segments** which are **valuable, findable and expandable.**
- Each segment defines: **next likely product, marketing spend strategy, and preferred communication channel**

Customer Segmentation Objectives:
- Define cluster using **Demographic/ Firmographic & Transactional data**.
- Describe and adjust cluster with **Attitudinal data from Marketing research**

Existing Customers

Predictive Model Objectives:
- **Establish segment predictive models** with firmographic data & cluster result of existing customers.
- **Assign cluster name** for each new account.
- **Describe cluster with Attitudinal data** from Marketing research for new accounts

New Account

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SMS&P Existing Customers

Cluster1 - Low	Cluster2 - Medium	Cluster3 - High	Cluster4 – Low	Cluster5 – Medium-Low	Cluster6 – Extremely High

Clusters Vary by: (Behavioral Data)
- Industry
- Company Size
- Firmographics
- Product Group
- Pricing Level
- Purchase Trends
- Annuity

Clusters Vary by: (Marketing Research)
- Company Background
- Firmographics
- Software Purchase Influence Factors
- IT Maturity
- IT Needs in 6-12 Months
- Microsoft NLP

Campaign Strategy - Customer Segmentation for Targeted Marketing
(Targeted Marketing Strategy Design)

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Existing Customers + New Account

Cluster1 - Low	Cluster2 - Medium	Cluster3 - High	Cluster4 – Low	Cluster5 – Medium-Low	Cluster6 – Extremely High
Most Suitable Products, A1, A2, A3, A4, A5	**Most Suitable Products, B1, B2, B3, B4, B5**	**Most Suitable Products, C1, C2, C3, C4, C5**	**Most Suitable Products, D1, D2, D3, D4, D5**	**Most Suitable Products, E1, E2, E3, E4, E5**	**Most Suitable Products, F1, F2, F3, F4, F5**

Product Campaign

Webcast   Seminar

Investment Strategy

1. Determine the most profitable path for each customer.
2. Next likely purchase is determined by product ownership relative to other members of the Cluster.
3. Marketing spend strategy is based on historic customer value to prioritize the budget.
4. Communication channel determined by both cluster and spend strategy.

Planning Approach

1. Define Customer Priorities   4. Build Messaging Strategies
2. Set Business Goals   5. Define Tactics
3. Map Goals to Clusters   6. Set Targeting

Prioritization

Priority 1
3W & Cluster

Priority 2
3W Only

Priority 3
3W Only