

Table of Contents

- 1 Omnichannel vs. multichannel
- 3 An omnichannel case study
- 5 Data's crucial role in an omnichannel strategy
- 8 The road to omnichannel: flowchart
- 9 Making the shift to an 'audience-focused' approach
- 10 Your 'audience-focused' checklist

Omnichannel: The ultimate guide to creating integrated campaigns

In a world of ever-fragmenting media consumption, marketers have long understood the importance of leveraging multiple channels within their marketing strategies. But increasingly, a mere presence in multiple channels isn't enough. Those efforts must be aligned around an acute understanding of the individual consumer to whom they're targeted. This alignment is what we're talking about when we refer to the Holy Grail of marketing, otherwise known as omnichannel.



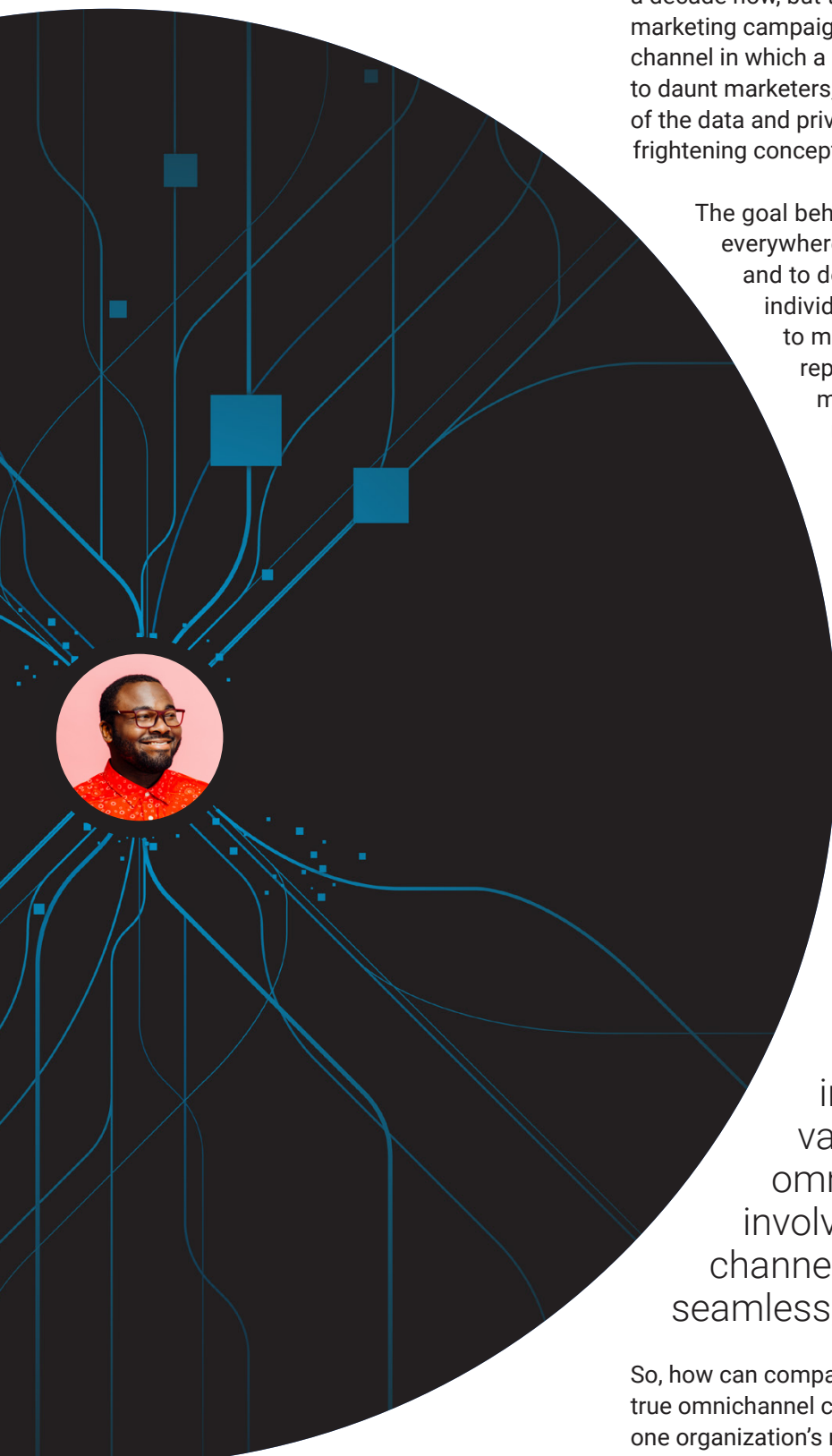
Omnichannel has been discussed as a concept for more than a decade now, but the term's lofty face-value suggestion—that marketing campaigns be present and cohesive across any media channel in which a consumer might encounter a brand—continues to daunt marketers, particularly in light of the continued evolution of the data and privacy landscape. But omnichannel needn't be a frightening concept.

The goal behind omnichannel marketing isn't to be everywhere. The goal is to be where it matters most—and to do so in a data-driven way that is aware of an individual consumer's journey with a brand. Compared to multichannel marketing, omnichannel marketing represents a concerted effort—one where all the moving parts are moving in harmony. While multichannel marketing entails having a presence in multiple channels, the executions themselves tend to be piecemeal and tactical—less strategic. Omnichannel solves for the disconnects that are often found in a multichannel approach.

“When defining multichannel marketing, we're referring to the ability to connect with supporters through a variety of channels, including social media, email, mobile, direct mail, print ads, landing pages and websites. However, each channel operates independently from each other and abides by their own strategy and goals,” says Amy Braiterman, VP of Strategy at Data Axle.

“Think of multichannel as omnichannel marketing's cousin. Both strategies involve interacting with supporters via various channels; however, an omnichannel marketing strategy involves integrating the different channels together to provide a seamless, connected experience.”

So, how can companies pivot their multichannel efforts to become true omnichannel customer experiences? Let's take a look at how one organization's recent journey illuminates the way.





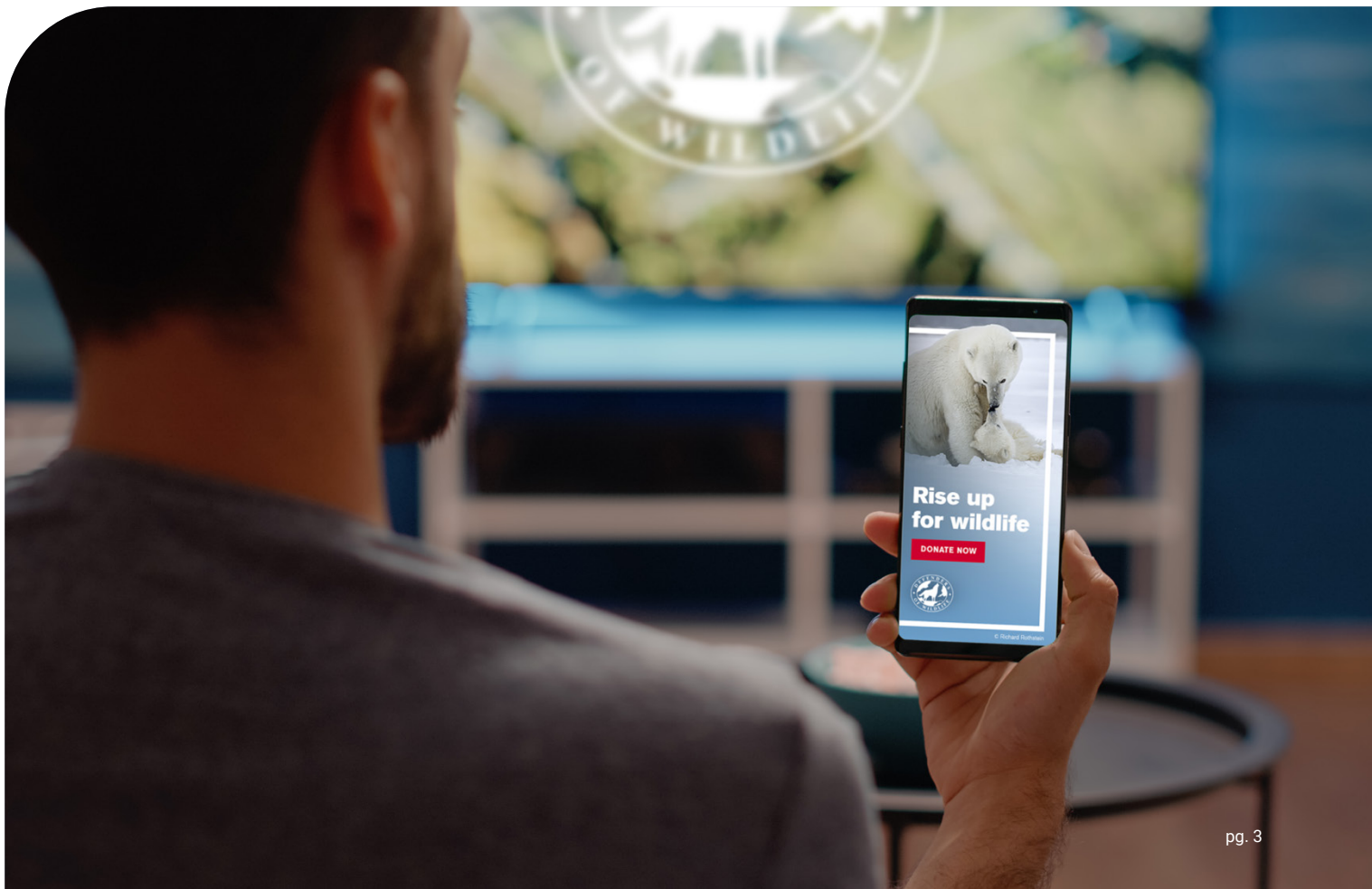
Defenders of Wildlife: Success Through Experimentation and Integration

Defenders of Wildlife is a nonprofit dedicated to the protection of wildlife, their habitats and our planet's fragile biodiversity. Founded in 1947, they employ a mix of tactics such as policy analyses and advocacy, litigation, innovative science and technology programs, and field conservation to accomplish their mission. And, as a well-established organization, they intuitively understand the need to continue to push the boundaries in their donor acquisition and retention campaigns, while doing so in a way that recognizes individuals across channels.

In an effort to take their marketing program to the next level and keep pace with shifting media habits, Defenders of Wildlife approached Data Axle with a request to test connected TV (CTV) as a channel extension of their existing efforts. The nonprofit was interested in adding CTV to their channel mix, specifically to boost their retargeting campaigns, increase site traffic, improve brand awareness and reach a younger audience. They needed a partner that could perform a comprehensive data analysis to identify the right audience, as well as execute a compelling ad campaign.

Data Axle worked with Defenders of Wildlife to execute a unique omnichannel campaign, with a focus on CTV, to raise brand awareness, engage prospective donors and boost fundraising during Q4 of 2020. The fourth quarter is a particularly important time of year for nonprofits, as 30% of annual giving comes in the month of December alone. Due to the COVID-19 pandemic, 2020 was also a year of uncertainty, which added extra pressure around program performance.

Together, Data Axle and Defenders of Wildlife used predictive modeling and Data Axle's donor database, Apogee, to create a custom audience of prospective donors. To target them, the teams created a CTV ad to drive brand awareness and a display retargeting ad with similar creative and messaging that was served to the same audience. Both campaigns drove the audience to Defenders' website and encouraged them to donate.





When the campaign launched, custom audiences were served both the display ads and the CTV ads. Data Axle refreshed the ad creative throughout the run time to allow banners to maintain freshness and relevance and to align with overall brand messaging. Engagement with the CTV ad peaked both during key holiday timing and when the creative was refreshed.

Data Axle kept tabs on performance—enabling Defenders to see which banners gathered the most impressions, clicks, conversions, etc.—to be used to inform future messaging. They also received insights into device and inventory type to further understand where and how they were reaching their audience.

With the help of Data Axle's services teams and proprietary donor datasets, Defenders of Wildlife successfully incorporated CTV into their existing channel mix to engage donors, reach a larger audience and drive fundraising in the crucial Q4 period.

Some of the results from the omnichannel campaign included the following:

300%

Defenders achieved higher than 300% ROI with this campaign.

\$225k

Defenders raised over \$225,000 via its website from the custom audience.

57%

57% of responders were new to file or reactivated lapsed donors.

12%

12% increase in direct mail acquisition response rate YOY

15%

Touched an audience that contributed 15% of overall revenue in this period.

94%

The campaign achieved a video-completion rate of 94%.

Overall, this omnichannel acquisition and reactivation strategy contributed to a great Q4 performance for Defenders of Wildlife and helped them achieve fundraising goals while also generating a three-fold ROI. Importantly, the organization demonstrated that organizations can tap into hot and emerging channels like CTV while still tying those efforts into their larger strategies in a seamless way. After all, true omnichannel marketing isn't about finding new channels that work. It's about finding new channels that can make all of your existing channels work better too.

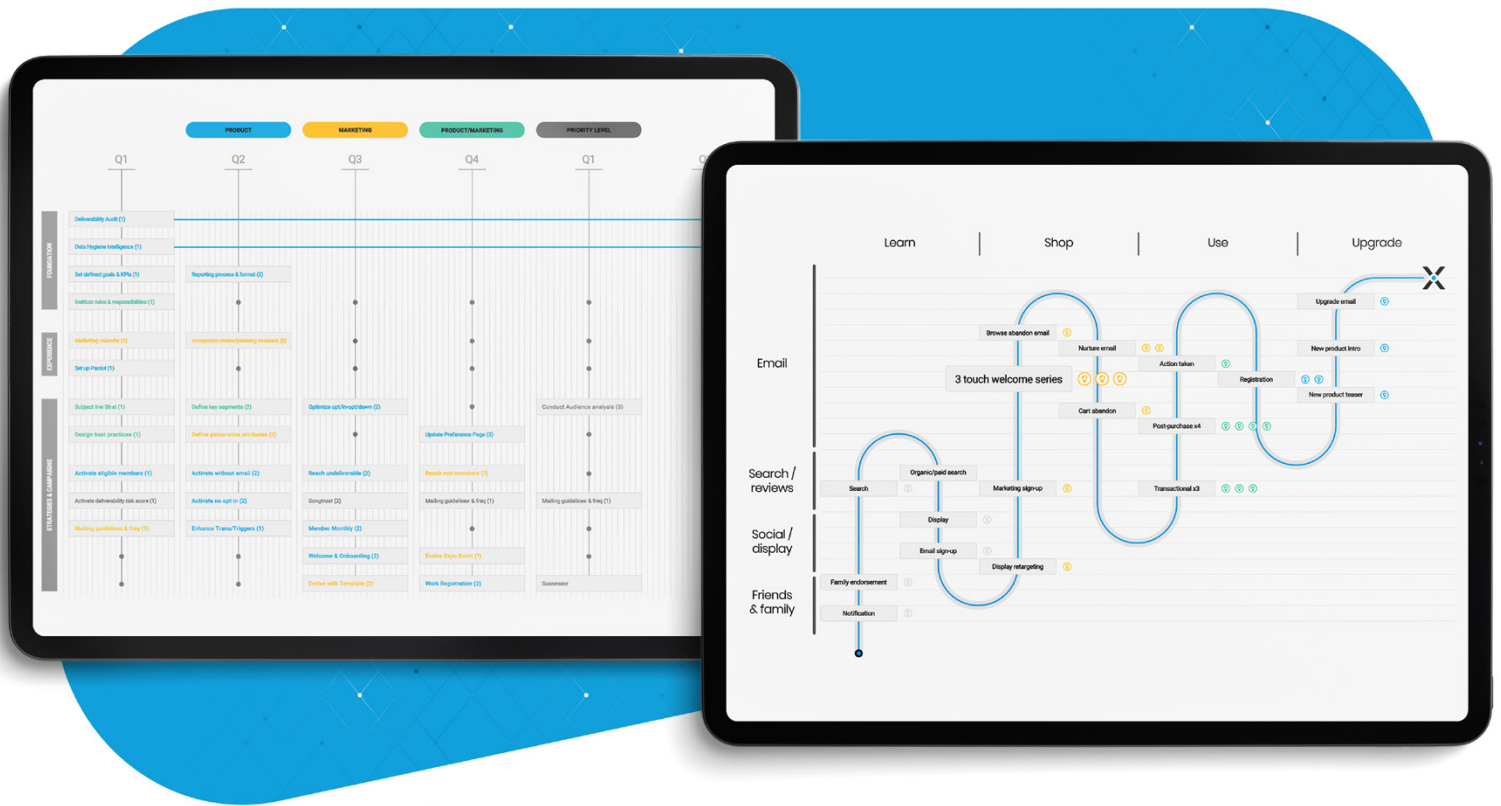


Data's Crucial Role in a Successful Omnichannel Marketing Strategy

Many of today's marketing organizations operate under multichannel strategies that leverage a variety of channels to get the word out about their products, services and causes. These strategies can be highly effective in getting consumers to interact with brands in distinct channels, but they're leaving a lot on the table, including deeper relationships with customers and cross-channel efficiencies and optimizations.

Enter omnichannel marketing. With omnichannel marketing, brands take a consumer-centric approach in order to achieve consistent messaging across channels for a more-personal, cohesive experience. This is the destination toward which many of today's marketing organizations are striving, but it can seem like a daunting journey—that is, unless you have a map.

That's precisely what good data provides—a map for the journey between multichannel and omnichannel marketing.



With the right data strategy, marketers can not only connect the dots among audiences on various channels, but they can also craft messaging that speaks directly to individuals based on their interests and needs at any given moment. Data enables marketers to create unique, personalized, consumer-focused experiences that enable people to interact with their brands when and where they prefer. It also enables marketers to observe and learn from their audiences, helping them to update their messages, campaigns and creative in real time.

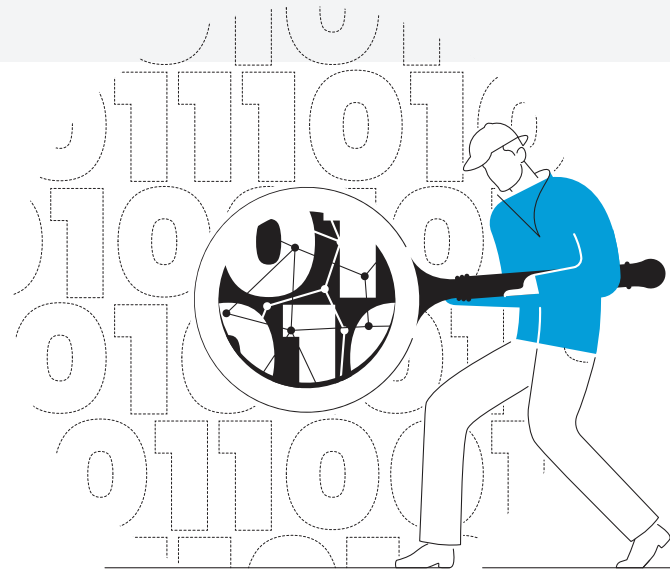
That's the end goal. But how do marketers get there? Let's take a look at the six data-driven steps needed to implement a successful omnichannel marketing strategy.



1. Audit your data.

Marketers have tons of data—customer data, third-party data, demographic data, behavioral data, programmatic data, you name it. To get started on the journey to omnichannel, you first need an inventory of what you have, how you're collecting it and what you're doing with it.

Importantly, you need to ensure you have the data needed to support the channels you're currently working in—and you need to ensure that data is marketable. If you have email addresses, are they active? If you're doing mobile text campaigns, do you have cell numbers rather than landlines?



2. Gain a 360-degree view of your audience.

Once you have a handle on your data assets, you need to dig deeper into who your customers are as people in order to truly engage them. Don't look at your audience as if they are a set of disparate data points. Rather, use data to take a more holistic approach. That means gathering up your disparate data files and laying them on top of one another to see where they overlap. That process will enable you to start looking at your data in a consumer-centric way, vs. a campaign-specific way.

3. Supplement your data with additional audiences.

Once you've started to understand your customers as individuals, it's time to take your understanding of them further. While the data you have on certain customers may be limited, you can gather a wealth of information on them beyond the basics you have in your database. Look to build out a complete profile of customers with demographic and psychographic (interests, attitudes, lifestyles) attributes, which are essential to creating personalized campaigns that cultivate meaningful, long-term relationships.

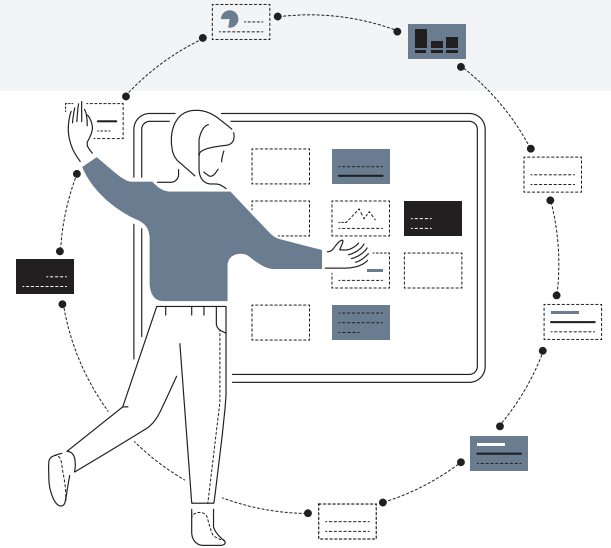
Based on the fuller customer profiles you develop, you can then develop models that can help you build out additional target audiences with similar characteristics as your best existing customers.





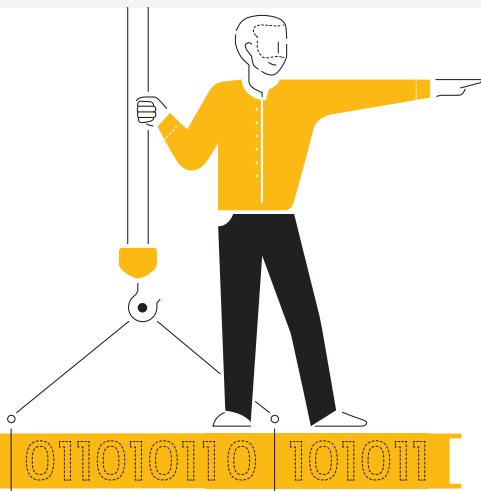
4. Make smart channel selections.

Once you have audiences, you need to turn your attention to channels. And—no surprise—when it comes to channel selection, you have to look at the data. Start with who your audience is: How do they communicate with you? Where do they spend their time? You can't make these decisions on a gut feeling; channel selection has to be based on data. By using the right data, including individual-level insights from past efforts, you can maximize channel engagement and efficacy.



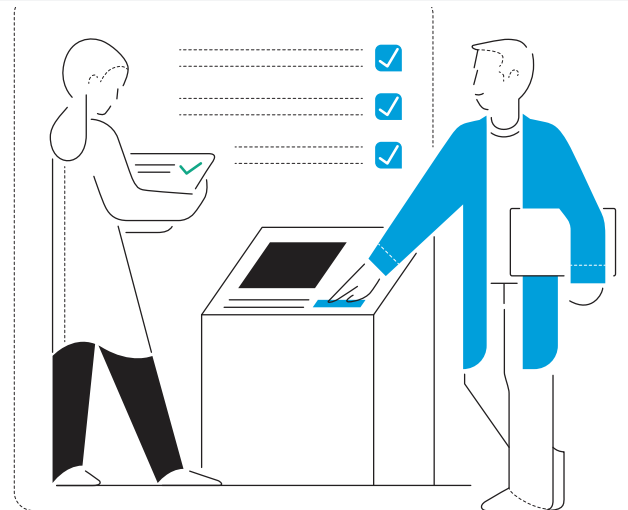
5. Structure your campaigns and set goals in a data-conscious way.

When setting campaign goals, you need to start with a line in the sand based on what you already know and what you want to learn per channel. For example, if you're measuring awareness, what percentage of your target audience already knows your brand? You need to establish at least one goal per channel, and it needs to be appropriate to the channel. Plan to capture data on whether you're achieving your goals, yes. But more importantly, capture data that can help you improve your efforts over time.



6. Measure results to refine for the future.

As John Wanamaker famously said, "Half the money I spend on advertising is wasted; the trouble is, I don't know which half." Of course, there's no excuse for this type of results blindness today—not if you're measuring your omnichannel campaign correctly. If you're starting with people, and not just cookies, you should be able to quantitatively understand which channels are driving performance among which types of consumers.



In the end, having good data makes marketing better—and this is especially true for organizations that are moving toward a more-omnichannel reality. By following the above six steps, and emphasizing data quality at every juncture, you can move your brand from a multichannel approach to a true omnichannel operation. Your customers—and your bottom line—will thank you.



The road to omnichannel:

Are you ready to start your omnichannel journey?

Deploying an omnichannel strategy can't be done overnight. Use this flowchart to figure out where you are on your road to omnichannel and identify your roadblocks.

Yes

No

Start here

Is omnichannel a priority for your organization?

Are you engaged in multichannel programs?

Start by trying multichannel tactics before developing an omnichannel strategy.

Start breaking down internal silos and allowing for the free flow of communication and data before trying omnichannel.

Have you broken down the silos among your current channels (e.g., direct mail and digital)?

Have you reached a mid-to advanced level of data maturity?

Data is the basis of a successful omnichannel campaign. Consider investing in data hygiene or management before trying omnichannel.

Do you have a 360-degree view of your target audience?

Do you have a clear message for this audience?

Have you pinpointed the channels that this audience is most receptive to?

Have you set up reporting dashboards and metrics by which to measure campaign success?

Have you launched campaigns in those channels before?

You're ready to give omnichannel a shot! Remember to utilize your data to create actionable insights and put the constituent at the forefront of everything you do and you should see success.

You need to meet your audience where they are - if you don't have enough insight into their behavior, any omnichannel strategy will fail.

Didn't make it to the bottom of the flowchart?

No worries, Data Axle and the Axle Agency are here to help! From data hygiene services and data management to omnichannel campaign design and deployment, we have a solution to get you started down the path to omnichannel marketing.



Making the shift to an “audience-focused” marketing program

An audience-focused approach involves aligning your marketing strategy, messages and content to the specific needs of your audience. Companies that take an audience-focused approach view everything through the lens of the consumer. This means shifting your mindset from “you” to “them.”

The approach requires in-depth knowledge about who exactly you’re trying to reach. If you don’t know your audience, it’s impossible to focus your marketing tactics on them effectively. In today’s world, this means knowing more than just demographics such as age, gender, income level, location, etc. You also need to know more specifics about what they value, their likes/dislikes, channel behavior, what websites they visit, if they have any declared preferences or interests via a preference page, etc.. With this kind of knowledge, you can develop and deliver content that is unique to them.

The benefits of becoming an audience-focused organization includes increased consumer engagement, an overall better customer experience and the always crucial metrics – increased conversions. The benefits are many – but shifting to audience-focused needs to be carefully planned out. As companies make the shift to an audience-focused approach, they also need to:

Adjust their goals to audience-focused goals and objectives

Shift to audience-driven metrics

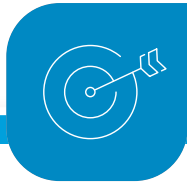
Learn which capabilities they need to be able to report and react based on audience and 1:1 responses – as opposed to channel responses.

Are you ready to take the leap? We’ve created a checklist of everything you need to get started on this journey.





Your audience-focused checklist



In-depth data on your target audience and strong hygiene practices

70% of all the data in your CRM goes bad every year. In order to maintain your audience-focused campaigns, you need to have the most accurate data on your prospects in order to stay relevant to their lifestyles, needs and interests.

Do you have accurate first-party data? First-party data is data collected by companies about their audience and customers (e.g., account history, purchase history, email activity, web behavior).

Do you have substantial third-party data? Third-party data is data collected by third-party data providers, like Data Axle, that do not have a direct relationship with the consumer. The data is gathered from various platforms, apps, and websites (e.g., consumer contact, demographic, psychographic or business data purchased from a data provider).

Do you clean your data at regular intervals (i.e., once a month, once a quarter, etc.)?

Do you have automated processes in place to ensure your data is updated?



Analytics and strategy (aka how to make sense of your data)

Now that you have clean and robust data, you can apply predictive models (e.g., propensity to purchase, look-a-like for acquisition, segmentation, personas). This provides the insights that drive the strategy and the creative process.

Is your target audience made up of prospects that have similar demographics as your highest lifetime value customers?

Does your target audience have similar online and offline behaviors as your highest LTV customers?

Have you created segments that will allow for better personalization and higher relevancy when communicating with the prospect?



Data-driven content and creative

When it comes to creating audience-focused messaging, don't start with, "What do I want to tell my audience?" The first question you need to ask is, "What is relevant to my audience?" When it comes to knowing what your audience needs to hear, you need to rely on your data - not your instincts or preconceived notions.

Do you have the data to complete a 360-degree view of your customer base?

Do you have the deep insights you need to know what messaging will resonate with your audience?

Do you have an audience-first 1:1 communication strategy?

Are you 100% confident your ads/messaging will be relevant to their lifestyle and current needs?

Have you selected channels that you know your audience frequently engages with?

Will your campaign deploy at a time when your audience is likely to engage?

Is your creative amazing and will it stand-out?

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