



The 5 Principles of  
**ENGAGEMENT  
MARKETING**



# INTRO

Every company has the same mission: to maximize their value. But in Marketo's view, your most valuable asset isn't your product, or your branding, or even your team—*it's your customers*. The most successful companies succeed because they excel during each stage of the customer lifecycle: in acquiring new buyers, in growing their lifetime value, and in converting them into advocates.

But in today's digital world, buyers are more empowered than ever. The internet gives them instant "information gratification"—they can access detailed specs, pricing, and reviews about goods and services, 24 hours a day, with a few flicks of their thumbs. Meanwhile, social media encourages them to share and compare, while mobile devices add a "whenever and wherever" dimension to every aspect of the experience.

All of which means that your buyers are forming opinions and drawing conclusions *well before* they choose to interact with representatives from your company.

Decision making is no longer confined to the showroom floor, or even to your company's website.

That's why it's up to the marketer to become the steward of the customer journey and build a bond with customers wherever they are—whether that means engaging on social media, presenting a unified experience across devices, or personalizing content and communications.

All this is easier said than done, which is why we're introducing a strategy for you—a strategy called "engagement marketing."

So what is engagement marketing?

Let's start with what *it isn't*: engagement marketing isn't about serving your buyers a particular product, or even serving them a particular experience. It isn't about one-off campaigns (no matter how compelling or involving), and it isn't about customer service (at least it isn't *just* about customer service).

Instead, **engagement marketing is about creating meaningful interactions with**

**people, based on who they are and what they do, *continuously over time*. It's marketing that engages people towards a goal, wherever they are, and it's marketing that is backed by both creative vision and hard data. Finally, it's marketing that allows you to move quickly, shortening the time between idea and outcome, so that you can create more—and better targeted—programs.**

To do this, marketers can use an Engagement marketing platform, which is a technology platform that's purpose-built to implement the engagement marketing principles. Engagement marketing platforms offer marketers the power and ease of software and tools tailored to help their marketing succeed at each stage of the customer lifecycle.

Interested? Keep reading. We'll walk you through the five elements of engagement marketing, and show how you can master this strategy.



Engagement marketing is about  
**CONNECTING WITH PEOPLE**

- **A**s individuals
- **B**ased on what they do
- **C**ontinuously over time
- **D**irected towards an outcome
- **E**verywhere they are

# Engaging People **AS INDIVIDUALS**

Most marketers are already personalizing their emails in simple ways—using the recipient’s first name, for example. But an engagement marketing approach goes far beyond email. Today’s buyers demand hyper-relevant communications that speak to them as individuals, and regardless of what industry you are in; you’re marketing to individuals at the end of the day.

So whether you’re talking to a CIO about software, or a new mom about breakfast bars, you’ll want to be well versed on your buyer’s individual preferences, history, relationship with your company, stage in the buying journey, and more. While persona-based marketing (which is extremely powerful on its own) defines and speaks to your “typical” buyers, 1:1 marketing speaks to individuals, on their own terms



# Engaging People **AS INDIVIDUALS**

## WHAT THIS LOOKS LIKE

Take, for example, a marketer for a large outdoor stadium that hosts football games. When it comes to football fans, the company wants to convert individual ticket holders into season ticket-holders, and to convert current season ticket-holders into lifetime ticket holders. In other words, the company wants to understand their customers as individuals, and tailor their marketing accordingly.

That company could use an engagement marketing platform to learn all about their customers: which game tickets individuals have purchased which teams individuals “like” or follow on Facebook, each fan’s favorite players—all of that information could become the fodder for marketing that speaks directly to individual customers.

Next, that company could even identify specific indicators that a fan is likely to purchase season tickets, and then nudge that person closer to a sale—maybe an email with a special discount code? The more you know about your audience, the more likely you are to make the best offer at the right time.



# Engaging People **BASED ON WHAT THEY DO**

An engagement marketing approach bases communications on behaviors, not demographics. Demographics tell you what a customer might be interested in; behaviors tell you what he or she is *actually* interested in.

Rather than assuming that, because a buyer fits a certain profile, he will be interested in a certain product, we can now target individuals based on how they actually behave. You can also use behaviors on one channel—say, an interaction on your company’s Facebook page— to inform marketing on another channel—such as the message that appears when that person visits your website.

To engage on this level, you need technology that can continually collect and compile rich data, and then target your buyers based on that data. To do so on a buyer’s individual terms, you need to know when she wants to be contacted, how she wants to be contacted, and what she wants to be contacted about. An engagement

marketing platform enables marketers to do this efficiently by making marketing assets— emails, landing pages, forms, segmentations, and workflows—easy to replicate and implement. This ability to fuse planning and execution allows marketers more flexibility than ever, which enables them to engage people quickly and personally, at scale.



# Engaging People **BASED ON WHAT THEY DO**

## WHAT THIS LOOKS LIKE

Let's look at an example from healthcare, where connecting with the customer base is a pain point. Healthcare marketers aim to drive loyalty and generate referral business with strong patient relationships. To build these relationships, their marketing teams try to reach their patients and deliver educational materials. But, the wide variety of medical histories and current health issues their patients face makes it difficult to address patients' needs and concerns individually.

While demographics could give them some insight into the kind of information patients want to receive, your communications wouldn't speak to the individual patient's specific concerns. On the other hand, if using an engagement marketing approach, the healthcare provider could listen and respond to behaviors.

If, for example, a patient has been reading up on heart disease on the healthcare provider's website, indicated a history of diabetes in an online survey, or clicked a link within an email about breast cancer screenings, using an engagement marketing platform, the provider would be triggered to send the patient more information about those

conditions. Rather than mass educating their entire patient base, or viewing their patients only in terms of broad categories like age or gender, the provider would be basing their communications on the individual—and what they do—to provide timely and relevant communication.



# Engaging People **CONTINUOUSLY OVER TIME**

True engagement marketing is a continuous process. According to Forrester research, today's customers distrust and resent one off campaigns that interrupt or intercept them—which is why your marketing should feel like a natural continuation of a conversation with your customer. The more time that you devote to that conversation, the more you know about your customers, and the deeper your relationships can grow. We now have the opportunity to listen and respond to every customer at every stage of his buying journey, keeping him engaged and helping to drive purchase decisions. Using intelligent nurture tracks, marketing messages should flow in a logical fashion, creating engaging, personalized conversations. It's not about individual messages, or even individual campaigns—every interaction asks for another interaction, and is part of a longer chain of events.

Continuous engagement also ensures that the initial purchase is only beginning of a customer's value. According to Bain & Company, repeat customers spend as

much as 67% more than new customers, and 49% of companies say they achieve a higher return-on-investment by focusing on engagement rather than acquisition. What's more, loyal customers are positioned to become advocates for your brand, helping you to create new business. That's why engaging with customers throughout their lifecycle isn't just about individual value—it's also about the value of their networks.





# Engaging People **CONTINUOUSLY OVER TIME**

## WHAT THIS LOOKS LIKE

Imagine a tech company with a huge potential customer base, but—probably because of their base’s size—huge competition. A competitive market and a high-investment product means it takes longer for those buyers to make a purchase decision; a longer buying cycle means it’s harder to keep the brand’s products top-of-mind.

Using an engagement marketing strategy, that tech company could instigate and maintain continuous conversations, offering

their potential customers a series of highly relevant, educational materials through email, social, and on their website. Over time, by listening and responding to their audience, and establishing themselves as trusted experts, they would earn the right to tell buyers about their products.

Once potential customers became actual customers, the conversation would shift gears. Now, the company would use their existing relationship to help make their buyers successful with their purchases—

possibly through “Getting Started” kits, guides, or explainer videos. And the conversion can continue, occasionally reminding customers about other offerings that would complement the original product.



# Engaging People **DIRECTED TOWARDS AN OUTCOME**

Once you've acquired a customer, your new goal is to create a long-term relationship--ensuring that you get the most value out of your customers, and they get the most value out of your offerings.

Whenever you communicate with your buyers, keep the customer journey in mind. Engagement marketing isn't about relationship building for its own sake—it's about relationship building toward a goal. At each phase of the buyer's journey—from acquisition to advocacy—your goal is to move those buyers into the next phase toward purchase or recommendation. To do so you need a clear understanding of that journey, a clear call-to-action in all of your marketing, and a way to tie each of your marketing activities to profit.

For example, you might design an infographic geared toward potential buyers who aren't necessarily familiar with your offering. But your goal isn't just to create awareness with your graphic; your goal is

to start building a relationship. Your call-to-action, in this case, might be an invitation to view more of your content (which will eventually lead to buyers sharing their information, like their email address, with you). If a curious buyer visits you at a tradeshow, your call-to-action might be to view a product demo; if a new customer visits your website, your goal might be to guide them toward your help resources. Established customers should be shown new products; long-time customers should be encouraged to become advocates for your brand. No matter where someone in the customer lifecycle, your goal should be to move him one step further along.

An engagement marketing platform empowers marketers to do just that—with its organization and process alignment, you can send the right communication to effectively push or nudge your customer at scale and with a measurable impact. With improved measurability, you can not only

track the impact of your efforts on profit, but you'll see what is working and what is not, helping you optimize your marketing to more effectively engage buyers.



# Engaging People **DIRECTED TOWARDS AN OUTCOME**

## WHAT THIS LOOKS LIKE

Take the example of a chain of fitness centers, with facilities all over the United States. The chain has already succeeded in driving huge numbers of visitors to their website, but if those website visitors aren't committing to gym memberships, their marketing efforts will go to waste.

Therefore, the call-to-action for all new website visitors is to schedule in person appointments—only during the appointment can they truly recruit new members. Using an engagement marketing platform, the fitness center chain could carefully study the path to conversion that their customers take. What do new visitors do the first time they land on the website? What do they click on? What series of page views or emails leads to that crucial in person visit?

Next, the fitness chain can use that information to accelerate the process. If a form on a particular website has a high response rate, consider moving that form to a more central page. If a particular email

isn't leading to appointments, that email needs to be tweaked—maybe it should be sent sooner, maybe it should be sent later, maybe it shouldn't be sent at all. Through a deep understanding of the path to purchase,

and therefore the best call-to-action at each point during that path, they can both measure and optimize their marketing at every stage and see a real impact on their bottom line.



# Engaging People **EVERYWHERE THEY ARE**

Today's customer is everywhere—online and offline. She moves seamlessly from one channel to the next, jumping from her email inbox, to her Facebook feed, to her favorite blog, to your website, then back to social media—all without losing momentum, and from whatever device is most handy at the moment. Marketing is no longer about being “multi-channel”; it's about being omni-channel. To meet your customers wherever they are, you need to deliver an integrated customer experience across every single platform.

That's why an engagement approach requires you to create a consistent experience for your customers—one that acknowledges the nuances of individual channels, yet still presents a unified message. But to make the shift from siloed communications, and to do it well, you need a platform specifically designed to drive engagement on your website, on tablets and smartphones, via email, through social networks, at in-person events, and beyond.

If you start a conversation with a customer on one channel, you should continue that conversation when she navigates to another. If, for example, she watches a video on your Facebook page, you wouldn't want to show her the same video on your website. Likewise, if she engages positively with an email you sent on a particular topic, why not reference that topic in a display ad she's shown?



# Engaging People **EVERYWHERE THEY ARE**

## WHAT THIS LOOKS LIKE

Imagine a marketer at a health and wellness publication, looking to drive awareness to the company's website (which publishes and reviews recipes), and increase engagement with the company's smartphone app. The problem is that their audience is huge—they have millions of users, who are using all kinds of devices. The brand wants to use

email as a primary communication driver, but to truly engage this multi-channel audience, they also want to leverage content marketing (through their blog), and social marketing on Facebook.

Using an engagement marketing platform, the brand can synchronize their efforts on every channel, and across every device. If

a customer logs into the app and enters information, they won't need to enter that information again online. Likewise, if a customer indicates she likes a certain kind of recipe (by rating it positively, for example) the brand might recommend a similar recipe via email. Regardless of where she interacts with your brand, the experience is seamless.



# ENGAGEMENT MARKETING TECHNOLOGIES

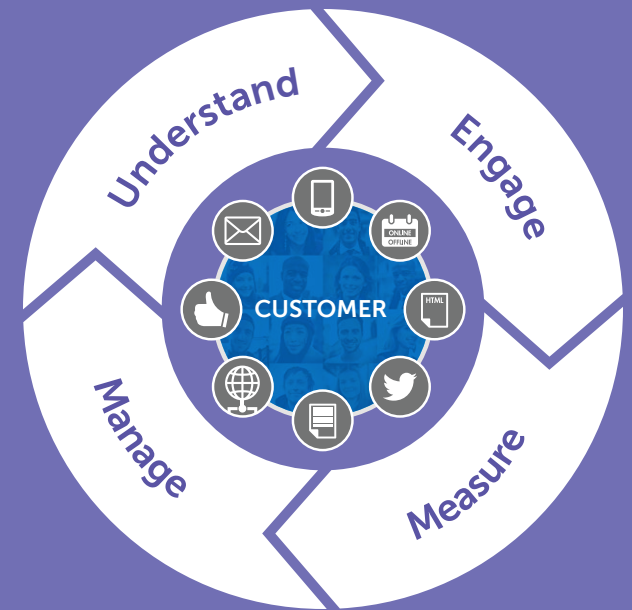
Now that we've covered the elements of engagement marketing, how can you put the principles into practice? The difference between success and failure is often choosing the right technology platform. Look for a platform that has been built, from the ground-up, to implement the engagement marketing principles.

Here's what your platform should deliver: A blend of power and ease. Your solution needs to provide a suite of software, tailored to help marketers succeed at each stage of the customer lifecycle. A unified experience. Rather than offering disparate solutions built separately for every kind of marketer, your solution should converge the best practices of B2B and consumer marketers of every size. An open platform. Given that no single suite can meet all of marketing's needs, your solution should be an open platform, able to easily integrate with hundreds of other marketing solutions via modern API technologies. Innovation at rapid speeds.

Finally, your solution should deliver the innovation required at the rapid speed needed by marketing today to:

- **Understand customer behaviors, affinity, and context across channels in a single data repository**
- **Engage your customers in a highly personalized way, building broader, more meaningful relationships**
- **Measure and maximize impact of your marketing investments across channels**
- **Manage, coordinate, and plan marketing activities across teams**

To deliver on these elements, your engagement marketing technology needs to offer the core components listed on the following page.





# ENGAGEMENT MARKETING PLATFORM

## Personalization

Powerful features to drive real-time interactions with targeted individuals through dynamically generated, personalized communications across email, web, ads and mobile channels.

## Marketing Management

A marketing calendar that fuses campaign planning and execution in one place, and helps marketing teams coordinate better, move faster, and get better results than ever before.

### Marketing Automation

Powerful software that combines ease and speed with enterprise-level power and flexibility, empowering marketers to quickly launch targeted campaigns with sophisticated lead scoring, lead nurturing and advanced workflow automation

### Cross-channel Engagement

The built-in capability to engage people continuously across channels including email, web, mobile, events, direct mail, and social media.

### Social Marketing

Truly integrated social marketing capabilities, including sweepstakes and referral campaigns, social polls, social media publishing, intelligent social sharing, analytics, and more.

### Search Engine Optimization

An easy-to-use tool that helps marketers without specialized knowledge optimize keywords, website and landing pages to drive more quality traffic.

## Marketing Analytics

Advanced analytics to help companies measure and maximize the ROI of programs across channels, and amplify the impact of marketing in revenue generation.

## Marketing System of Record

A single source of truth to understand and track customer behavior, affinity and context across all channels.

# CONCLUSION

In the digital era, your customers are your most valuable asset, and only those who successfully engage them throughout the customer lifecycle will succeed. And that means that marketers must master an engagement marketing strategy—through a deep understanding of the five core principles, combined with the technologies needed to act upon them.





Marketo (NASDAQ: MKTO) provides the leading marketing software and solutions designed to help marketers master the art and science of digital marketing. Through a unique combination of innovation and expertise, Marketo is focused solely on helping marketers keep pace in an ever-changing digital world. Spanning today's digital, social, mobile and offline channels, Marketo's Engagement Marketing Platform powers a set of breakthrough applications to help marketers tackle all aspects of digital marketing from the planning and orchestration of marketing activities to the delivery of personalized interactions that can be optimized in real-time. Marketo's applications are known for their ease-of-use, and are complemented by the Marketing Nation®, a thriving network of more than 400 third-party solutions through our LaunchPoint® ecosystem and over 50,000 marketers who share and learn from each other to grow their collective marketing expertise. The result for modern marketers is unprecedented agility and superior results. Headquartered in San Mateo, CA with offices in Europe, Australia and Japan, Marketo serves as a strategic marketing partner to more than 3,750 large enterprises and fast-growing small companies across a wide variety of industries. For more information, visit [www.marketo.com](http://www.marketo.com).