

# **Siebel Marketing and Marketing Analytics**

*- Learnings from the Leading Edge*

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# Agenda

- Today's Marketing Environment
- The New Objective For Marketing
- Siebel Marketing Overview
- A Successful Implementation Approach
  - Business Analysis
  - Managing Change
  - Prepare and Implement
  - Release and Support
- Case Studies
- Question and Answers

# Customer Systems

- Specialized IT consulting company providing real expertise in:
  - Siebel CRM
  - Siebel Analytics / Oracle BI EE
- Mission is to provide real expertise with consultants knowing the product at least as well as the software vendor's consultants
- Core Values
  - Extreme Expertise
  - Dedication to Client's Mission
  - Integrity
- Founded in February 1998, ~40 employees, USD 10m revenues
- 250+ Siebel implementations spanning 21 countries and 4 continents

# Today's marketing environment

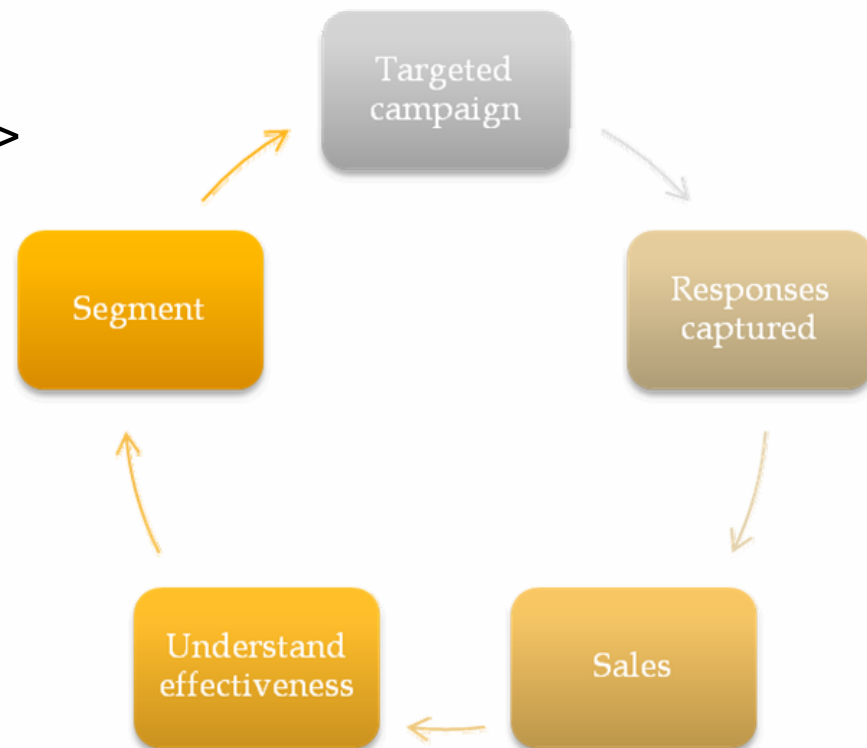
- Challenges
  - Saturation of marketing messages
  - Recipient apathy
  - Generic marketing no longer works
  - Brand differentiation is no longer enough
- Running to stand still
  - harder just to maintain the same level of result in marketing
- Constant pressure to make marketing more effective

# New Objectives of Successful Marketing

- Actionable campaigns
  - AIDA - Awareness > Interest > Desire > Action
- Personalisation of the marketing messages
- Tighter targeting by segmentation on new data categories
- Closing the loop
  - tracking responses and use this intelligence to tune current campaigns and increase effectiveness
- Campaigns using multiple channels  
e.g. Email -> Web -> Call centre

# New Objectives of Successful Marketing

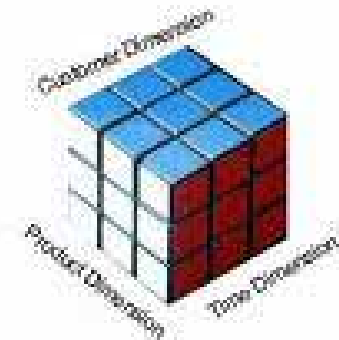
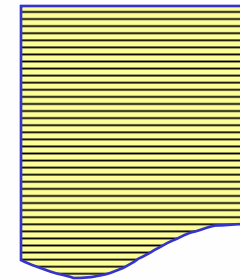
- Siebel Marketing
  - A holistic solution
  - A wealth of functionality > supports most requirements
  - Powerful segmentation
  - Capitalises on segmentation with personalisation of messages
  - Powerful marketing intelligence/analysis of responses and effectiveness



# Siebel Marketing Overview

# Campaign Targets

- Contact Lists
  - Purchased from a vendor or
  - Exported from an external system
  - Imported into Siebel Marketing Module
  
- Contact Segments
  - Allows the user to include (and exclude) campaign targets based on the data available in a data warehouse
  - Created in OBIEE (Analytics) and imported into Siebel Marketing Module
    - Both Siebel and completely stand-alone data warehouse is possible





# Segmentation in Siebel Analytics

The screenshot shows the Siebel Analytics Segments interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: `http://localhost/analytics/saw.dll?MktgSegments&CustType=Contacts`. The interface includes a navigation menu on the left with categories like 'Subject Area', 'Customer Profile\_segmentation', and 'Other Subject Areas'. The main content area displays a segmentation rule titled 'Contacts in the Tristate area with Very Good Credit Score'. Below the title, there are instructions and a 'Find Contacts:' section with 'Sample Size' set to 100% and 'Count' set to Cumulative Counts. A table on the right shows the cumulative count for each step in the rule.

Step	Cumulative Count
Start With All Active Contacts in the Warehouse	9,014
Keep Country is equal to / is in USA	403
Keep State or Province is equal to / is in NJ, NY, CT	59
Keep Credit Score Range is greater than 620	59

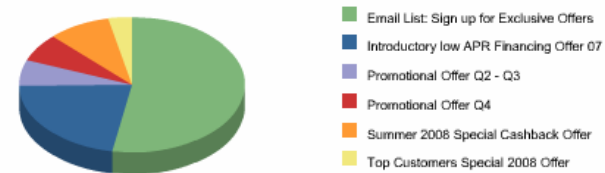


# Campaign Evaluation

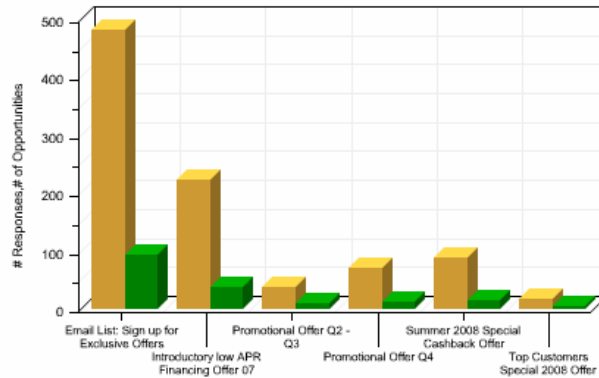
## 2008 Offer Campaign Overview

Offer Name	# Loaded	# Responses	# of Opportunities
Email List: Sign up for Exclusive Offers	799	483	94
Introductory low APR Financing Offer 07	356	222	39
Promotional Offer Q2 - Q3	59	37	11
Promotional Offer Q4	112	70	12
Summer 2008 Special Cashback Offer	142	89	16
Top Customers Special 2008 Offer	45	19	6

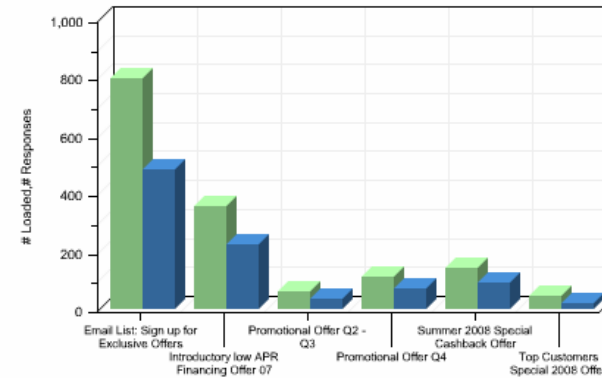
# of Opportunities by Offer



Response vs Opportunity



Contacted vs. Responded



# A Successful Implementation Approach

- Business Analysis
- Business Change
- Prepare and Implement
- Release and Support

# Business Analysis

- Often most challenging aspect of Marketing project
  - Marketing, leads and sales are crucial to business
    - vital to get requirements right
  - Marketing is often a very manual process
    - introducing an application is a big step
  - Marketeers often work in an unstructured way
    - introducing rigid process is a big step

# Business Analysis

- It is important to:
  - Win ‘buy-in’ and commitment early by making the benefits clear
    - Powerful segmentation
    - Cross channel campaigns
    - Lead handling
    - Understanding effectiveness  
(Campaign → Responses → Sales → Revenue)
  - Demonstrate Siebel Marketing
    - Run realistic campaign scenarios
    - Show how current campaigns will be met in Siebel Marketing

# Business Change

- Focused first release...
  - Replicate current campaigns
  - Replace the manual steps
- ...but build excitement
  - Introduce some sophistication e.g. staged campaigns
  - Make the most of powerful segmentation
- Consider
  - Not planning to run new campaign types in first phase (though plan for the functionality now)
  - Whether to immediately stop using external agencies (e.g. continue to design collateral externally)

# Business Change

- If parts of the marketing process are brought in-house from 3rd parties
  - Internal team responsibilities expands
  - More internal effort is needed to run a campaign
    - but campaigns can generally be executed more quickly
- To avoid objections and problems
  - Manage expectations – of the user and the business
  - Continue to communicate the benefits and ‘wins’
  - Provide close support



# Prepare and implement

- Siebel CRM
  - Enable object manager / add the licenses / configure GUI / Web Services, etc
- If OBIEE / Siebel Analytics is already used
  - Can existing subject areas support segmentation? What else is needed?
  - For Response Intelligence, does the vanilla content remain in your repository or has it been removed? Does it meet your needs?
- If other data warehouse is already used
  - Can re-use tables and data
  - Need to implement OBIEE / segmentation on top
- If no data warehouse is currently used
  - Mini project of its own > may not take many man days

# Prepare and implement

- Infrastructure considerations for email marketing
  - Some components require external access outside the firewall
  - How can fulfilment be automated when using external fulfilment house?
    - Email, ftp or other to method to send target lists?
- Hardware
  - Marketing can be process intensive – resize?
  - If Siebel Analytics is being introduced for the first time new environments are needed

# Prepare and implement

- Data Quality
  - Key for effective segmentation
  - If Excel is the current tool for segmentation > ad-hoc cleaning is likely
  - If email marketing is to be used, what is the quality of the email ids held. Is there duplication?
  - Consider a review of data quality and a clean up exercise

# Release and support

- Consider phasing of new functionality and process
  - running only current processes but use the new (powerful) segmentation for a period
  - continuing with external fulfilment for a period
  - continuing current campaign types for a period
- As users become more expert start to
  - Bring fulfilment in-house
  - Introduce complex campaign types

# Release and support

- Regular workshops during the project will build understanding of the application
- Plan the specific campaigns to be run after go-live
  - Support will be needed
  - Also schedule support when new or more complex functionality is used
- Provide process / application champions if possible
- Expect new requirements to emerge after go-live
  - users become segmentation experts > think of new ways to segment
  - campaign effectiveness is improved > users want to target campaigns more tightly
  - support for additional marketing channels



## **Case Study: Electronics distributor**

- A fast, targeted deployment of Siebel Marketing and Sales Analytics
- Objectives:
  - Segment on any Siebel data
  - Email marketing
  - Flexibility and speed of execution  
(aim to run a new, tightly targeted campaign at least daily)
- Project delivered in 25 man days

# Case Study: Automobile manufacturer

- Major Marketing deployment
- Objectives:
  - Full closed loop marketing
  - Complex segmentation
  - Multiple fulfilment channels
  - Complex follow-up campaigns
  - Detailed campaign and sales analytics providing intelligence on campaign execution and effectiveness
- Project delivered in 5 months

# Recap

- Done right, Siebel Marketing can have a huge impact
  - More effective marketing
  - More sales
  - Understanding and control of the process
- For a successful implementation
  - Expert resource is important
  - Experienced resource is important
  - Carefully manage requirements, expectations and change



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