

Treating Every Customer Like Your Only Customer With Oracle Marketing

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April 16, 2008

Agenda

- Treating Every Customer Like Your Only Customer
- Oracle Marketing & One-To-One Marketing
- Generating Target Audiences
- Designing Marketing Activities
- Tracking and Using Marketing Metrics
- Completing the One-To-One Marketing Cycle

Treating Every Customer Like Your Only Customer

- One-To-One Marketing Strategy
- Based On
 - History
 - Preferences
 - Characteristics
- Increased Customer Response and Loyalty

Challenges

- Maintaining Customer History
- Delivering Consistent Customer Messages
- Personalizing Every Interaction
- Generating Return on Investment

Oracle And One-To-One Marketing

- How To Accomplish This
 - Leverage External & E-Business Customer Data
 - Generate Target Audiences
 - Lists
 - Segments
 - Design Targeted Marketing Activities
 - Source Codes
 - Click-Thru Destinations (CTDs)
 - Track & Analyze Metrics
 - Interaction History
 - Responses, Financial Metrics

What Type of Data is Available?

- External Data
 - Spreadsheets of Customers
 - Data Warehouses with Customer Data
- Internal Data (E-Business Data)
 - Interaction History
 - Customer TCA
 - Order Information

Interaction History

ORACLE Administration Console Home Profile Sign Out Help

Interaction History

Interaction History Viewer

Quick Find [Advanced Search](#) Logged In As MGRMKT

Interactions
Activities

Interaction History Viewer

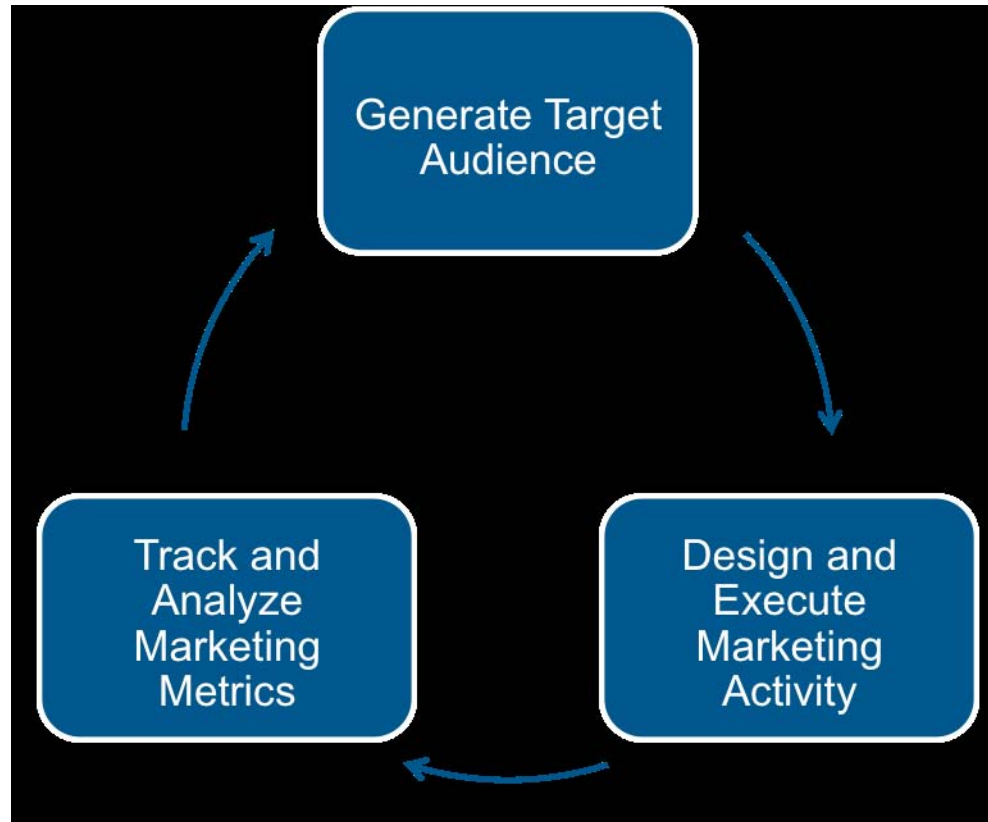
Customer	Contact	Agent	Account	Start Date	End Date	Duration	Active	Application Name	Campaign	Outcome	Result	Reason	Action	Code	Method	Notes for Interaction
3M Health Care		Taylor, Phillip Charles		18-JAN-2006 05:09:45 PM	18-JAN-2006 05:11:45 PM	120.0		TeleSales		Contact	Sale					
3M Health Care		Taylor, Phillip Charles		20-JAN-2006 06:14:04 PM	20-JAN-2006 06:14:09 PM	5.0		TeleSales		Request Processed						
3M Health Care		Taylor, Phillip Charles		20-JAN-2006 06:14:33 PM	20-JAN-2006 06:17:22 PM	169.0		TeleSales		Request Processed						
3M Health Care		Taylor, Phillip Charles		23-JAN-2006 12:27:04 PM	23-JAN-2006 12:28:03 PM	59.0		TeleSales		Request Processed						

First | Previous 1-4 of 4 Next | Last

Interaction History Home Profile Sign Out Help

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One-To-One Marketing Cycle



Generating Target Audiences

- Aggregate Data from multiple sources
- By Creating Lists
 - List Import
 - Natural Language Query Builder
- By Creating Segments

Creating Lists

- List Import
 - Import Types
 - TCA or Staging Tables
 - Types of Import Records
 - Consumers
 - Organizations
 - Organizational Contacts
 - Leads
 - List Generation

List Import – Flat File

List Import Flat File

Organization Nam	Contact First Nam	Contact Last Nam	Contact Email	Org Address	Org City	Org Stage
Organization 1	Mike	Willauer	email@email.com	Address 1	City 1	PA
Organization 2	Kathy	Book	email@email.com	Address 2	City 2	CA
Organization 3	Barry	Carpenter	email@email.com	Address 3	City 3	MT
Organization 4	Dawn	Johns	email@email.com	Address 4	City 4	VT
Organization 5	George	Stahl	email@email.com	Address 5	City 5	HI
Organization 6	John	Moyer	email@email.com	Address 6	City 6	FL
Organization 7	Mary	Weber	email@email.com	Address 7	City 7	NY
Organization 8	Zack	Kapanski	email@email.com	Address 8	City 8	NJ
Organization 9	Steve	Romonko	email@email.com	Address 9	City 9	DE
Organization 10	Courtney	Casterline	email@email.com	Address 10	City 10	CA

List Import – List Type

[Audience Dashboard](#) > [Import Overview](#) > [Import Introduction](#) > [Import Details](#) > Import Customer Details

Import Step 1b: Additional Details

[Cancel](#) [Next](#)

Indicate more details about the Import data. Skip this section if not applicable to your Import data. Select Next to save your changes and continue.

Import Type **Organizations, Contacts, Addresses**

Name **Import Organization Contacts**

Description

Source Purchased List Rented List Others

Rented Lists will be imported into Marketing only and can be deleted at a later time. Purchased Lists and Other Lists will be imported into Marketing and the Customer Master and will become permanent Customer Master records.

Vendor

Cost

Expiration Date

Number of Uses

Setting an Expiration Date and/or Number of Uses will restrict the use of this Import in creating Lists. Rented Lists must enter an Expiration Date and/or Number of Uses.

[Cancel](#) [Next](#)

List Import – Map Fields

[Audience Dashboard](#) > [Import Overview](#) > [Import Introduction](#) > [Import Details](#) > [Import Customer Details](#) > [Import Mapping](#)

Import Mapping

Cancel Next Restore

Source data labels and Target data labels are shown as the first and the second columns below. You can load a previously created mapping or define your own and save it as a new mapping. To define your mapping, select the Source Field from the first column and corresponding Target Field from the second column. The mandatory fields are marked with an asterisk*. A sample of your data is provided in the Preview section to help you define your mapping.

Load Existing Mapping Save New Mapping

First Name and Last Name in Target Fields are mandatory if you choose to map any Person related attributes. Address1 and Country in Target Fields are mandatory if you choose to map any Address related attributes.

Source Fields

- Company Address
- Company Country
- Company Postal Code
- Company State
- Contact Job Title**
- Contact Last Name
- Contact Phone Number

Target Fields

- Address Attribute1
- Address Attribute10
- Address Attribute11
- Address Attribute12
- Address Attribute13
- Address Attribute14
- Address Attribute15
- Address Attribute16
- Address Attribute17
- Address Attribute18
- Address Attribute19
- Address Attribute2
- Address Attribute20
- Address Attribute3
- Address Attribute4

Mapping: Source =>Target

Company Name :::: * Organization Name
Contact First Name :::: Person First Name

Preview

BizTech, Mike, Willauer, 1150 First Ave, PA, 19106, US, 1112223333, Business Analyst

Clicking on Next will save your changes.

Cancel Next Restore

List Import – Review Import

ORACLE Audience Workbench
Diagnostics Home Logout Preferences Help Personalize Page

[Import Overview](#) > Import Report

Import Details

The Import details and results are summarized below.

General

Type	Leads	Import ID	10192
Name	Leads Transaction	Created By	Shook, Mr. Benjamin
Data Type	Consumers	Creation Date	01-MAY-2004
File Name	LeadsImportgrade.csv		
Description	Leads Transaction		

Mapping

- Address1->Address1
- Budget->Budget Amount
- BudStat->Budget Status Code
- Category->Customer Category Code
- Country->Country
- Customer Name->Customer Name
- Fname->First Name
- Lname->Last Name
- Promocode->Promotion Code
- ResponseCh->Channel Code
- Sourcesys->Source System

Results

Number of Imported Records	0
Number of Error Records	5
Number of Duplicate Records	0

Creating Lists

- Natural Language Query Builder (NLQB)
 - Build Criteria on any Data Captured In Oracle or In External Data Sources (e.g., Data Warehouses)
 - Technical Resources Are Not Necessary
 - Allows the Marketer to Focus on Marketing
 - Example:
 - *Customers who purchased product X*
 - *Customers who responded to marketing activity Y*

NLQB

ORACLE Audience Workbench

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Audience Dashboard >

Create List

* Indicates required field

* List Name Status **Draft**
 Audience **Persons** Owner **Shook, Mr. Benjamin**
 Purpose **General Purpose** List Template Name **Interaction Follow Up - B2C**

Selections

Conditions	Remove
marketing source code <i>is</i> January E-Mail Campaign Activity	
and interaction date <i>is between</i> 01-Jan-2008 and 31-Jan-2008	
and interaction result <i>equals</i> Email Sent	

Options

De-Duplication Rule

List Size

All Records
 Random Percent of Rows
 Maximum Size

SQL Statement

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Creating Segments

- Dynamic List of Entries
- Built Using SQL or Workbook
- Usually in a Segment Hierarchy

- Example:
 - Customers who purchased products in 2007
 - Customers who purchased product **A** in 2007
 - Customers who purchased product **A** with a warranty in 2007

Segment

[Audience Dashboard](#) > [Segments Overview](#) > [Customers Purchasing Project Software in January 2008](#) > [Last Printer Customers January 2008](#) > Segments Hierarchy Overview

Segment Hierarchy

Segment Name: **Last Printer Customers January 2008**

[Create](#)

*Segment Name	Parent Segment	*Code	Creation Date	*Owner	Number of Children	*Status	Size
 Laser Printer Customers December 2007, January 2008, February 2008		LPC3MONTHS	26-AUG-2004	Shook, Mr. Benjamin	1	Available	286
<ul style="list-style-type: none"> • Last Printer Customers January 2008 	Laser Printer Customers December 2007, January 2008, February 2008	Bus_World	01-OCT-2004	Shook, Mr. Benjamin	0	Available	35

[Return to Summary](#)

Generating Target Audiences

- Combine Lists & Segments
- Dedupe Entries
- Check Fatigue & Do-Not Contact Lists

Target Audience

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Audience Dashboard >

Create List

* Indicates required field Cancel Back Finish

* List Name Status **Draft**
 Audience **Organization Contacts** Owner **Shook, Mr. Benjamin**
 Purpose **General Purpose**

Selections

Add

Action	Name	Type	Size	Remove
Include ▾	Business World Contacts	List	11	
Include ▾	AO Segment	Segment	209	
Include ▾	CL 2008 User Group Conference	Import List	15	

Options

De-Duplication Rule

List Size All Records Random Percent of Rows Maximum Size

Cancel Back Finish

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Marketing Activity Design & Execution

- Multiple Types of Marketing Activities
 - Advertising
 - Print
 - E-Mail
- Include methods to capture interactions:
 - Click-Thru Destinations
 - Landing URLs
 - Unique Source Codes

CTD

Email/Fax Details

If not specified, Sender, From Name and Reply-To fields will always be defaulted with corresponding fulfillment server setup values.

Sender marketing@localhost.oracleleads.com
From Name marketing@localhost.oracleleads.com
Reply-To marketing@localhost.oracleleads.com
Subject Our Latest Product

Add
Add
Add
Add

title
title
title
title

Preview

Body
HTML Version

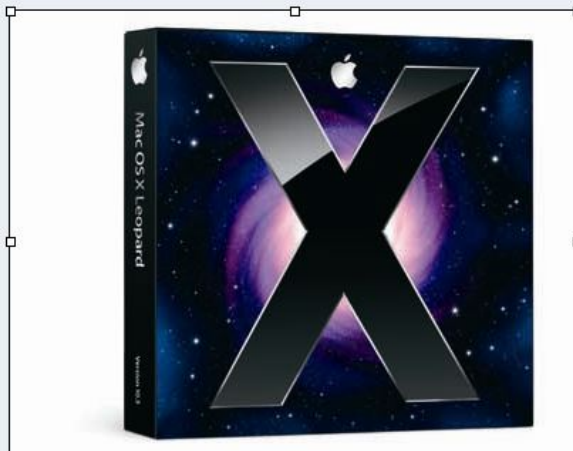
Font Color 3 View HTML Source

B I U [List Icons] [Link Icon] [Image Icon]

Hi <first_name>,

Click Thru Destination URL

Check out our latest product!



<

<<

title
first_name
last_name
pin_code
campaign_source_code
source_code
offer
customer_id

CTD

Define Click Through Destination

* Indicates required field

Cancel Apply

* Action

* URL

- Go To URL
- Go To Shopping Cart
- Go To Item Details
- Go To Shopping Cart With an Item
- Go To Section
- Go To Store Registration Page
- Go To Site
- Go To Web Script
- Go To Content Item

Cancel Apply

Marketing Activity Design & Execution

- Marketing Activity Design & Execution Process
 - Select Appropriate Medium
 - Add Target Audience
 - Include Customer Facing Content
 - Set up & Review Tracking Metrics
 - Execute Marketing Activity

E-Mail Marketing Activity

ORACLE Campaign Workbench Diagnostics Home Logout Preferences Help Personalize Page

Audience Dashboard > Audience User Dashboard - Welcome Shook, Mr. Benjamin >

Activity Details: CL 2007 Email Blast

* Indicates required field

* Name
 * Source Code
 Campaign

Purpose
 Channel
 * Status

Template
 * Launch On
 End On

* Coordinator
 Marketing Medium
 Priority

Repeats

Objective

Target Group Status **Available** Last Generated Date **11-Oct-2007**

Statistics

Unique Records Selected	14	Target Group	14
Records De-Duplicated	0	Control Group	0
Records Suppressed	0		
Size Reduction	0		
Records Fatigued	0		

Total Records Removed **0** Final Contact Group **14**

Selections

Selection Method **Advanced** Audience

Add

Action	Name	Type	Size	Remove
<input type="text" value="Include"/>	CL 2008 User Group Conference	List	14	<input type="button" value="Remove"/>

Processing Options

Marketing Activity Metrics

- Metrics For All Activities
 - Revenues
 - Costs
 - Opportunities
 - Leads
 - Orders
- Not the best metrics for one-to-one marketing strategies

Marketing Activity Metrics

Purpose: Channel **Direct Mail** * Status: Active
 Template: **Print - Direct Mail** * Launch On: 02-Oct-2003 End On: 03-Oct-2003
 * Coordinator: Shook, Mr. Benjamin Marketing Medium: (example: 27-Feb-2008) Priority: Standard
 Repeats: None Objective: ...

Offering Collateral Target Group Collaboration Tracking Additional Information

Scorecard

Display Cost Revenue Metrics All
 View: Revenues Hierarchy

[Expand All](#) | [Collapse All](#)

Focus Name	UOM	Forecast	Actual	Variance (%)	History	Remove
<input type="checkbox"/> Revenues						
Booked Revenue per Booked Order	US dollar			N/A		
Booked Revenue per Lead	US dollar		0.00	N/A		
Booked Revenue per Response	US dollar			N/A		
Invoiced Revenue per Response	US dollar			N/A		
Invoiced Revenue per Booked Order	US dollar			N/A		
Invoiced Revenue per Lead	US dollar		1.02	N/A		
Return on Investment by Booked Revenue	%		2900			
Return on Investment by Invoiced Revenue	%		-100			
<input checked="" type="checkbox"/> Total Booked Revenue	US dollar	1,500,000.00	0.00	-100		
<input checked="" type="checkbox"/> Total Invoiced Revenue	US dollar	0.00	267.90	N/A		
<input checked="" type="checkbox"/> Total Revenue	US dollar	0.00	0.00	N/A		

Marketing Activity Metrics

- Click-Thru Destination Metrics
 - Responses
- Specific Activity Metrics:
 - E-Mails Opened
 - Web Advertisement Impressions
- All tracked in Interaction History

E-Mail Activity Metrics

Target Tracking History						
Target Group Size	Total Contacted	Total Fatigued	Fatigue Rate	Total Supressed	Total Duplicates	Control Grouped
251	251	0	0	0	0	0

Email Specific Details		
Outbound Collateral		
Content Type	Content	Current Live Version
11510_Content_Type	Vision Inkjet Upgrade Promotion - email cover letter	1

Fulfillment Statistics						
Request Id	Request Creation Date	Emails Sent	Emails Bounced	Emails Malformed	Emails Opened	Number of Opt Outs
12753	29-Sep-2004	0	0	0	0	0

Response Statistics	
Metric	Count
Total number of unique clicks	0
Total number of unique responses	0
Other Responses	0
Total number of clicks	0

Click Through Destination Analysis					
Click Through Action	Click Through Association	Total Responses	Total Anonymous Responses	Total Unique Responses	Web Script Report
No search conducted.					

E-Mail CTD Metrics

- CTD-Based Metrics

Metric	Total (# of clicks)	CTD URL #1 (# of clicks)	CTD URL #2 (# of clicks)
Total Anonymous Responses	0	0	0
Total Unique Responses	2	1	1
Total Responses	2	1	1

Table 2: CTD Analysis of an e-mail activity with two CTD URLs

Conclusion: Completing The Cycle

- Analyze Metrics in Real-Time
- Apply to Target Audience Generation
- Develop Targeted Marketing Activities
- Continue Cycle of Learning and Personalizing

For Additional Information

- Documentation
 - Oracle Marketing User Guide
 - Oracle Marketing Implementation Guide
 - *The One to One Future (One to One)* by Don Peppers and Martha Rogers
- Contact Mike Willauer
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