

# Treating Every Customer Like Your Only Customer With Oracle Marketing

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# 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

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Interaction History

Interaction History Viewer

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

**Interactions**  
Activities

Interaction History Viewer

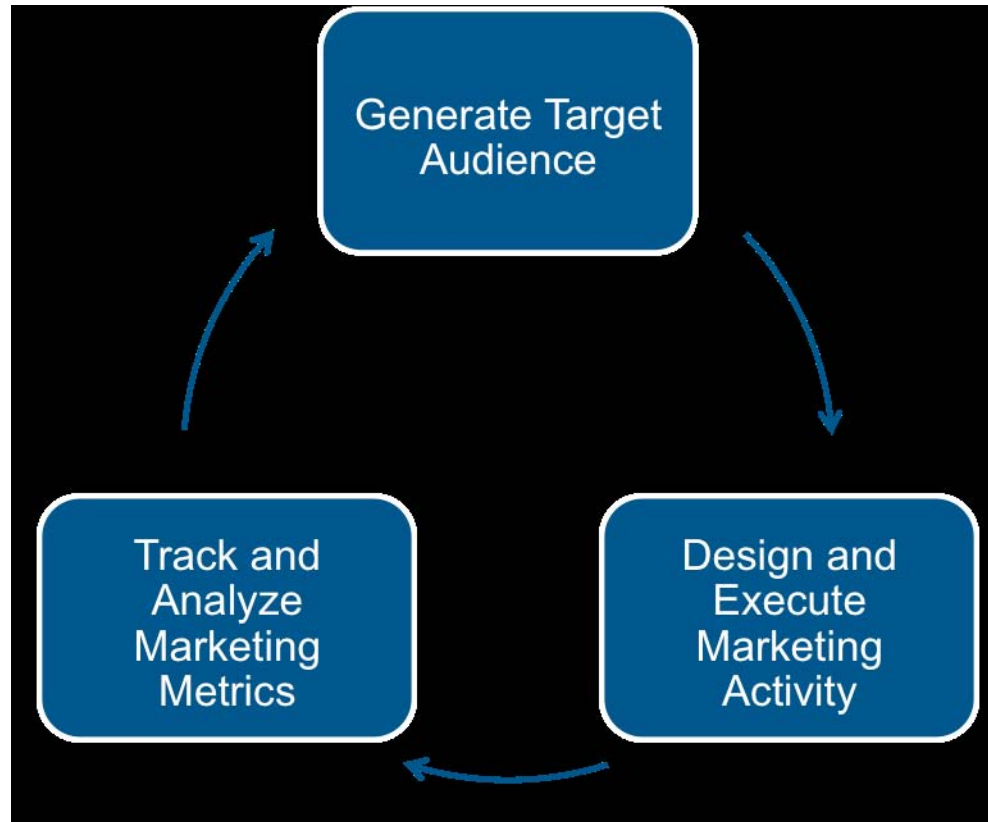
Customer	Contact	Agent	Account	Start Date	End Date	Duration	Active	Application Name	Campaign	Outcome	Result	Reason	Action	Code	Method	Notes for Interaction
<a href="#">3M Health Care</a>		Taylor, Phillip Charles		18-JAN-2006 05:09:45 PM	18-JAN-2006 05:11:45 PM	120.0		TeleSales		Contact	Sale					
<a href="#">3M Health Care</a>		Taylor, Phillip Charles		20-JAN-2006 06:14:04 PM	20-JAN-2006 06:14:09 PM	5.0		TeleSales		Request Processed						
<a href="#">3M Health Care</a>		Taylor, Phillip Charles		20-JAN-2006 06:14:33 PM	20-JAN-2006 06:17:22 PM	169.0		TeleSales		Request Processed						
<a href="#">3M Health Care</a>		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	<a href="mailto:email@email.com">email@email.com</a>	Address 1	City 1	PA
Organization 2	Kathy	Book	<a href="mailto:email@email.com">email@email.com</a>	Address 2	City 2	CA
Organization 3	Barry	Carpenter	<a href="mailto:email@email.com">email@email.com</a>	Address 3	City 3	MT
Organization 4	Dawn	Johns	<a href="mailto:email@email.com">email@email.com</a>	Address 4	City 4	VT
Organization 5	George	Stahl	<a href="mailto:email@email.com">email@email.com</a>	Address 5	City 5	HI
Organization 6	John	Moyer	<a href="mailto:email@email.com">email@email.com</a>	Address 6	City 6	FL
Organization 7	Mary	Weber	<a href="mailto:email@email.com">email@email.com</a>	Address 7	City 7	NY
Organization 8	Zack	Kapanski	<a href="mailto:email@email.com">email@email.com</a>	Address 8	City 8	NJ
Organization 9	Steve	Romonko	<a href="mailto:email@email.com">email@email.com</a>	Address 9	City 9	DE
Organization 10	Courtney	Casterline	<a href="mailto:email@email.com">email@email.com</a>	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

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.

# 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

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[Import Overview](#) > Import Report

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**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**

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**Selections**

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

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**Options**

De-Duplication Rule

List Size

- All Records
- Random  Percent of Rows
- Maximum Size

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**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
 <a href="#">Laser Printer Customers December 2007, January 2008, February 2008</a>		LPC3MONTHS	26-AUG-2004	Shook, Mr. Benjamin	1	Available	<a href="#">286</a>
<ul style="list-style-type: none"> <li>• <a href="#">Last Printer Customers January 2008</a></li> </ul>	<a href="#">Laser Printer Customers December 2007, January 2008, February 2008</a>	Bus_World	01-OCT-2004	Shook, Mr. Benjamin	0	Available	<a href="#">35</a>

[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 ▾	<a href="#">Business World Contacts</a>	List	11	
Include ▾	<a href="#">AO Segment</a>	Segment	209	
Include ▾	<a href="#">CL 2008 User Group Conference</a>	Import List	15	

**Options**

De-Duplication Rule

List Size  All Records  Random   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

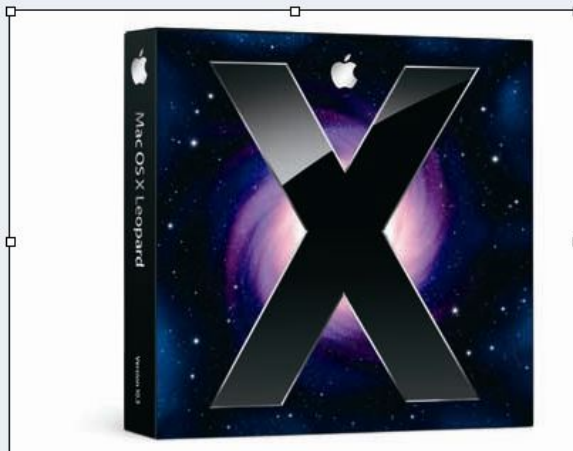
Font Color 3 View HTML Source

**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

Go To URL

\* 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	<b>14</b>	Target Group	<b>14</b>
Records De-Duplicated	<b>0</b>	Control Group	<b>0</b>
Records Suppressed	<b>0</b>		
Size Reduction	<b>0</b>		
Records Fatigued	<b>0</b>		

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

**Selections**

Selection Method **Advanced** Audience

Add

Action	Name	Type	Size	Remove
<input type="text" value="Include"/>	<a href="#">CL 2008 User Group Conference</a>	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		









