2014 Merkle’s CRM Executive Summit

The Rise of the Platform Marketer: Connected CRM in a Digital World

MARKETING TECHNOLOGY
Introducing the Platform Marketer Competencies

2014 Merkle’s CRM Executive Summit
Introducing the Platform Enablers
Session Content

- Integration of Interaction Data in a Digital Driven World
- The Connected Customer Platform
- Region’s Cross Channel Sales & Service Integration (CCSI) Project
- Summary – Key Outcomes & Benefits
Integration of Data in a Digital Data Driven World
There are a unique set of market conditions that is creating a perfect storm for marketers.
However, to take advantage of this opportunity marketers must be able to effectively integrate and organize digital interaction data to create the Connected Customer View. Then utilize the Connected Customer View across Marketing Ecosystem.

- **Connected Customer View** of the consumer across all touchpoints
- Allows clients to analyze their programs in context of the whole picture
- Valuable insights on consumer value, attitudes, and behaviors
- Attribution – provides foundation for effective measurement
- Multi-media, multi-channel optimization based on facts
The Connected Customer Platform

Enabling the Connected Customer View
Merkle manages and delivers the connected customer view to the entire marketing ecosystem through a combination of proprietary tools and integration of best in class technologies we call the Connected Customer Platform (CCP)

<table>
<thead>
<tr>
<th>Audience Platforms</th>
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<tr>
<td><strong>Media Execution</strong></td>
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<td>DSP</td>
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<td>Integration</td>
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<td>Web Services</td>
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<td><strong>Analytics</strong></td>
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<td>Connected Attribution</td>
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<td>Forecasting/Simulation</td>
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<td>Business Intelligence</td>
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<td><strong>Identity Management</strong></td>
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<td>Onboarding</td>
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<td><strong>Marketing Database</strong></td>
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<td>Customer 360°</td>
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The identity management platform stays on top of the constantly evolving definition of “identity” in the digital world and can build the “identity map” which is the foundation of the connected customer view and enables the connection of the customer event stream.
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Sarah

Sarah is a young affluent home owner who is not a customer.

She’s researching remodeling options when she comes across a Regions ad.

Information about her site browsing and chat session is collected and helps us learn more to identify her.

KEY
- Marketing DB
- Identity Mgmt
- DMP/Decision Mgmt

Customized offer reinforced through off-site targeting.

Site personalization for appointment setting

Branch visit builds upon previous interactions

Retargeted search ad is customized based on her interests.

Conversion attribution across all touch points

Site Personalization and Proactive Chat
Region’s Cross Channel Sales & Service (CCSI) Project Objective

Drive measurable business impact through experiences that anticipate customers’ and prospects’ needs and preferences.

Enabled by an automated technology platform that aggregates insights from transactions and interactions to create, broker and disposition customized messaging, offers, guidance & insights across all touch points.
We know how prospects and customers **transact** with us across channels...

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<tr>
<th>Branch</th>
<th>Contact Center</th>
<th>IVR</th>
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<th>Digital Media</th>
<th>Email</th>
<th>Direct Mail</th>
<th>Mobile</th>
<th>Social Media</th>
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**Transaction Data:**
- Application
- Balance
- Deposit
- Withdrawal
- Payment
- Alerts
A wealth of insights about how customers and prospects interact with us remain trapped within channel data siloes.

**Interaction Data**
- Product Inquiry
- Site Browsing
- Abandoned Applications
- Email & Direct Mail Campaign Response
Ability to aggregate interaction behaviors across channels to inform, prioritize and broker opportunities

- Lead Prioritization
- Channel Prioritization
- Insights about Interests & Behaviors
- Recommended Offer/ Message
Centralizing insights about how prospects & customers interact with us across all channels to drive...

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1. **Timely Leads**
   - Browsing, inquiry or abandoned application in any channel triggers follow-up

2. **Higher Conversion**
   - Offers are refreshed near real time, prioritized and brokered across channels

3. **Improved Retention**
   - Attrition risk behavior (e.g., move, service event) and loyalty behavior is monitored and intercepted with targeted outreach
### CCSI Program Timeline

#### 2014

<table>
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<tr>
<th>Q1</th>
<th>Near Term Wins – Connect select channel interactions to improve lead &amp; disposition timeliness and trigger follow-up communications based on behavior (e.g., browsing, inquiry, attrition risk)</th>
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<th>Q4</th>
<th>Phase 1 – Aggregate behavioral data across key touch points and enable targeted prospect and customer nurture programs across channels.</th>
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#### 2015

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<th>Q4</th>
<th>Phase 2 – Integrate all channels to collect behavior and broker messaging in near real time.</th>
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Regions is building the CCSI project using the connected customer framework.
This connective tissue is critical to realize the power of a holistic solution, a connected customer view, and addressability at scale.
Summary

Key Outcomes & Benefits
A CCSI business case was created using 4 main buckets (get, grow, retain, enhance).

Retention of existing customers is estimated to have the highest return on investment.

Early enhancements through Near Term Wins were established to offset early investment in foundational build.

Across the customer life cycle, there are significant business opportunities that can be addressed through a cross-channel approach to data capture to drive customized messaging.
Gartner - High performance demands a digital engine: Gartner surveyed 285 top marketing leaders about their digital marketing strategy, activities and spend. We found that digital marketing is quickly becoming a budget priority, with the customer experience as a central focus.

Source: 2014 Gartner's Digital Marketing Spending Survey
Thank You!

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