Chris Wilson

is a Managing Director and the Head of client services at full-service B2B marketing agency Earnest. The agency combines game-changing strategy and creative to deliver real results for clients. Earnest offers B2B branding, integrated planning, marketing automation and through-the-line execution. Chris has worked on both client and agency sides of the fence, working with the likes of Fujitsu, HP, Allianz, IBM and Vodafone. He led Loewy's business-to-business arm and the marketing communications division of the Team. He is also the Chairman of the Association of Business-to-Business Agencies (ABBA).

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Personalize the message

Bait and switch

Chris Wilson
Earnest
12 Great Titchfield Street
London W1W 8BZ, UK
Tel: +44(0) 20 3463 9453
Email: chris.wilson@earnest-agency.com

Case Study

Thunderhead — Nothing says 'I am ...' like personalized marketing

Chris Wilson

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Abstract

Customer communications management software vendor Thunderhead needed to generate demand for its application among senior executives operating in Europe's largest banks and insurers. As a vendor of personalization, multi-channel software, the campaign had to practice what the company preaches. The 'I am ...' campaign was created by Earnest to deliver the right message to the right executive at the right time. It included targeted direct mail and email, personalized URLs, online content, digital marketing and social marketing. The marketing activity was closely aligned with the vendor's sales force to maximize engagement, leading to a £4.4 m demand pipeline being created.

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Context

Thunderhead is one of the fastest growing software companies in EMEA. It is a leading provider of enterprise solutions for customer experience management. With its cloud-based ONE platform, Thunderhead.com provides powerful software-as-a-service solutions for customer engagement across all touchpoints.

The company's customer communications management software is used by large companies to personalize the way they engage with customers, delivering the right message, through the right channel at the right time.

Strategy

- Develop an integrated campaign targeting leading retail banks and insurers based in the United Kingdom, Germany, Austria and Switzerland.
- Switch busy, often cynical, senior executives onto the virtues of using Thunderhead's software.

Leads and engagement

Objectives

- Generate leads to drive Thunderhead's revenue growth in EMEA.
- Build a strategic dialogue with board-level executives in target companies.
- Extend engagement beyond the IT department.

Rigorous data profiling

Target audience

Working with its B2B marketing agency Earnest, Thunderhead determined early on that its campaign needed to practice what the software vendor preaches and ensure any communication was highly personalized to the target recipient. With this in mind, 6 weeks of rigorous data capture and profiling ensued — from identifying the key movers and shakers in each target account across a number of functions to the very important personal assistants and executive assistants that serve as gatekeepers. A total of 1,000 highly qualified prospects were developed for the campaign.

This data capture and profiling process included:

1. Initial bought-in data (eg, D&B).
2. Rigorous manual cleansing by telemarketing (checking all details by phone).
3. Highly targeted prospects were also double-checked using LinkedIn.

Grouping targets by role and rank

Segmentation

The prospects identified during data capture and profiling were then segmented using a number of variables:

Type of organization: Retail Bank, Insurer (Life & Pensions), Insurer (Property & Casualty), Insurer (Private Medical Insurance), General Financial Services.

Function: Technical, Marketing, Compliance, Line of Business Market Facing, Line of Business Back Office, Other board.

Role: Strategic, Operational, Gatekeeper.

Account priority: Tier 1, Tier 2.

Region: the United Kingdom, Germany, Switzerland and Austria.

Issues-based content

Building the messaging

It was clear that a one-size-fits-all message would not float the boat for targets of this campaign. So the agency developed a robust messaging matrix that was then tested with independent industry consultants familiar with the customer communications management software sector.

The focus was on tuning into the issues faced by different contacts based on their role, the function they operate in, the type of organization and even their company's strategic goals, garnered from reports and accounts, and news releases.

Personal and individual

Developing the creative

The campaign needed a creative theme that was flexible enough to accommodate different messages, different regional languages and nuances, and which would work across different media.

‘I am ...’ provided just that, giving us a compelling device to show the many ways Thunderhead helps each target contact address their issues and the benefits it brings.

Strategic and operational messaging

Constructing the campaign programme

For each different target group, the audience journey that the campaign wanted to deliver was fully mapped out. This looked at how the activity could maximize reach and cut through, while minimizing wastage. Importantly, it clearly defined how the marketing and sales effort would be integrated to ensure a seamless experience for each target.

Strategic programme

Gatekeepers: received a personalized postcard giving them advance warning that a box was being delivered to the named executive they were responsible for and asking them to kindly pass it on. These targets made up approximately 10 per cent of the campaign volume.

Tier 1 board-level executives: received a direct mail pack containing an iPod Shuffle pre-loaded with a tailored 60-second message from Thunderhead. The accompanying booklet was personalized according to their role. For a select number of targets, these booklets were ‘hyper-personalized’ — tailored to address their organization’s stated business priorities. Each booklet featured a personalized URL. Approximately, 10 per cent of targets were in this group.

Tier 2 board-level executives: received a direct mail pack containing a coffee pot, cup, saucer and Arabic ground coffee. The accompanying booklet was personalized according to their role. Each booklet featured a personalized URL. This group made up 40 per cent of targets.

Operational programme

Tiers 1 and 2 operational level executives: received a series of three personalized postcards and emails delivered weekly, with the content tailored depending on their role within the organization. Each communication featured a personalized URL. Targets in this group made up 40 per cent of campaign volume.

Sharing and socializing content

Delivering a personalized microsite experience

Personalized URLs enabled the campaign to deliver a tailored online experience for each target. The site aggregated a selection of content assets relevant to their business, from white papers and podcasts to case studies. A sharing function enabled them to readily share content with their colleagues and allowed us to capture further contacts.

The site was built in Eloqua's marketing automation platform and integrated with Salesforce.com. This meant any interaction with the site could be captured and used to trigger key events. These included:

- Real-time email alerts to the appropriate Sales Rep detailing the pages visited by the target.
- Automated emails being sent to all site visitors thanking them for their visit, providing the contact details of their Sales Rep and encouraging them to follow us via social media.
- Automated generation of weekly reports detailing all interaction with the site.

Creating a viral video

Surround sound

At the same time as running the core campaign activity, the brand was also keen to maximize opportunities-to-see Thunderhead among its targets. As such, Earnest created a research video called the 'Disconnected Customer', showing the issues faced by banks and insurers today with regard to their customer communication.

The video was promoted through targeted Google and LinkedIn keyword campaigns, along with active promotion via social media — Twitter, YouTube, blog comments.

Following up hot leads

Sales engagement

The campaign's success hinged on the buy-in of the Thunderhead sales force. So the campaign aimed to involve them as early as possible — from working with Earnest to identify and prioritize targets to ensuring they were clear on their role in following-up. The goal was to ensure that all targets were followed-up within 48 hours of visiting the site — essentially, striking while the iron was hot!

Phasing the programme

Timings and budget

The campaign has been executed in waves to ensure the volumes were manageable for follow-up by sales.

- UK roll-out began in April 2011.
- German, Austria and Switzerland roll-out began in June 2011.
- Roll-out to the United States and Asia-Pacific was being planned.

The overall budget for the EMEA campaign was £120,000.

Return on Investment (ROI) of 110:1

Results

The first wave of the UK campaign targeted 394 contacts and generated a pipeline of £4.4m — a 110:1 ROI.

Building demand and pipeline

Summary

Thunderhead came to Earnest with the trickiest of briefs: to generate demand for its software among senior executives operating in Europe's largest banks and insurers — a notoriously tough audience.

What's more, as a leading provider of software that enables highly personalized, multi-channel communications, Thunderhead wanted the campaign to practice what it preaches.

The result was the 'I am ...' campaign created by Earnest — an integrated marketing programme delivering the right message to the right executive, at the right time.

What did it involve?

- High-impact direct mail and email, tailored to each audiences' needs featuring personalized URLs.
- An online experience aggregating relevant content assets and backed by a marketing automation platform.
- Search and social media activity to increase opportunities to see and engage.

The whole campaign was constructed to deliver a seamless audience experience from the first engagement through to the sales meeting. Marketing and sales efforts were coordinated to make every communication count.

The result? A £4.4m pipeline and ROI of 110:1 to date. Plus a programme that is now being extended to the United States and Asia-Pacific.