

Customer Journey Centricity Strategies

By Amanda Farley,
Partner + Accounts Director at SSDM



SSDM

We're an integrated agency
focused on the customer journey

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**Hello there!
I'm Amanda, Partner +
Account Director at SSDM**

We're an integrated digital agency in metro Detroit that is 100% focused on the Customer Journey.

This is bigger than just using the right platforms. It also involves looking at teams, departments and all the things within your organization, and the customer journey, which is really complicated.

As marketers, a lot of times we like to talk about this perfect funnel and how you drive awareness at the top of the funnel and then all of a sudden leads and sales kinda fall out the bottom.

Right?

Well, the reality is that the "funnel" actually looks a lot more like a tornado, with no clear start or stop.

Strategy mapping



Photo by You X Ventures on Unsplash

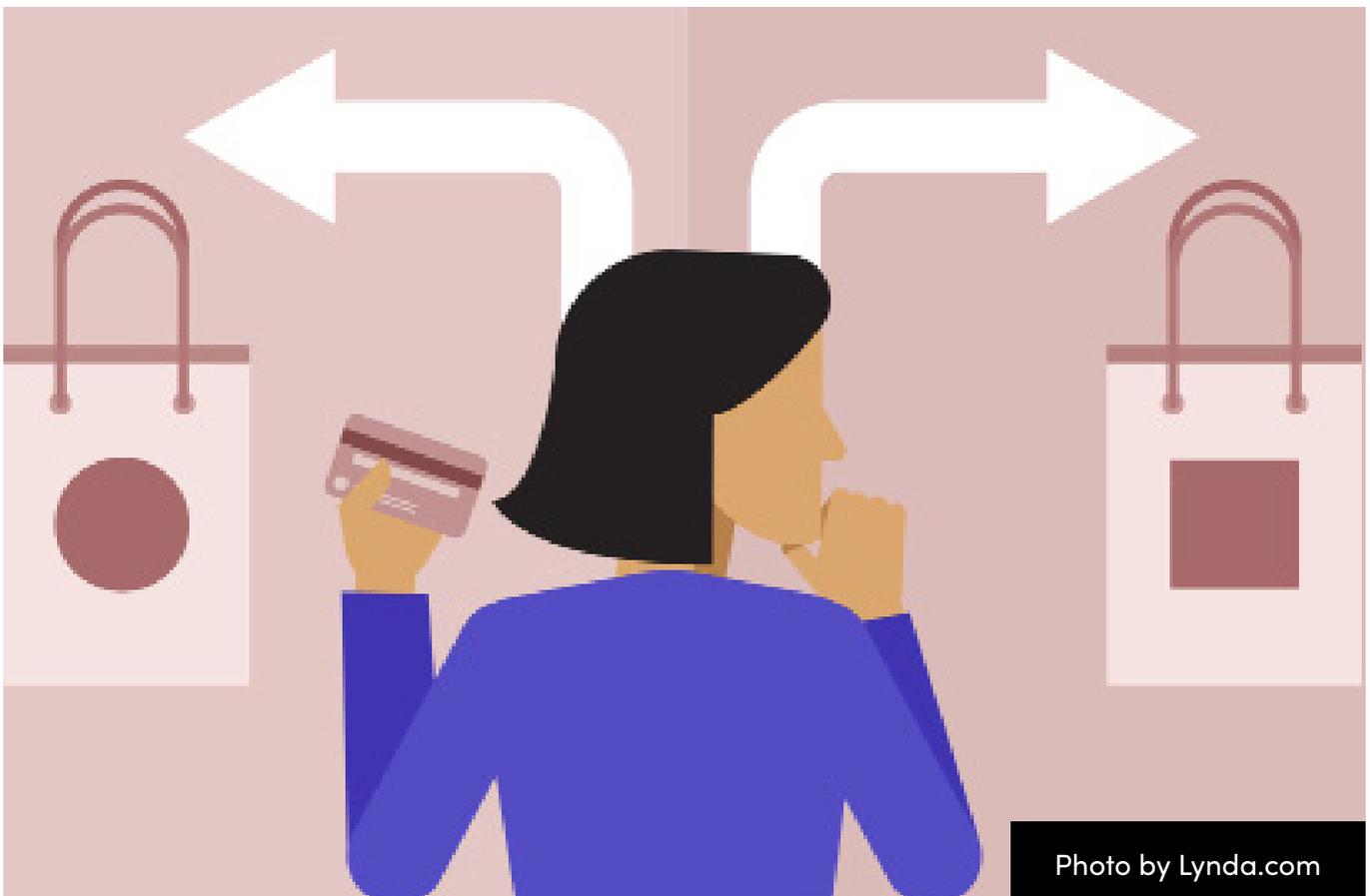
At the start of a campaign, or when we take on a new client, we have to calculate all the variables that exist for their customers. Like average length of the buyer's cycle, the emotional investment of the purchase, the dollar investment and timeliness.

If you're purchasing a house, what goes into making that decision is going to be very different than a decision on a contractor if your roof is leaking, or if you're purchasing a car, or buying something on Amazon. Depending on the type of product or service that you're offering, these decision criteria are going to be very different.

Consumer behavior patterns

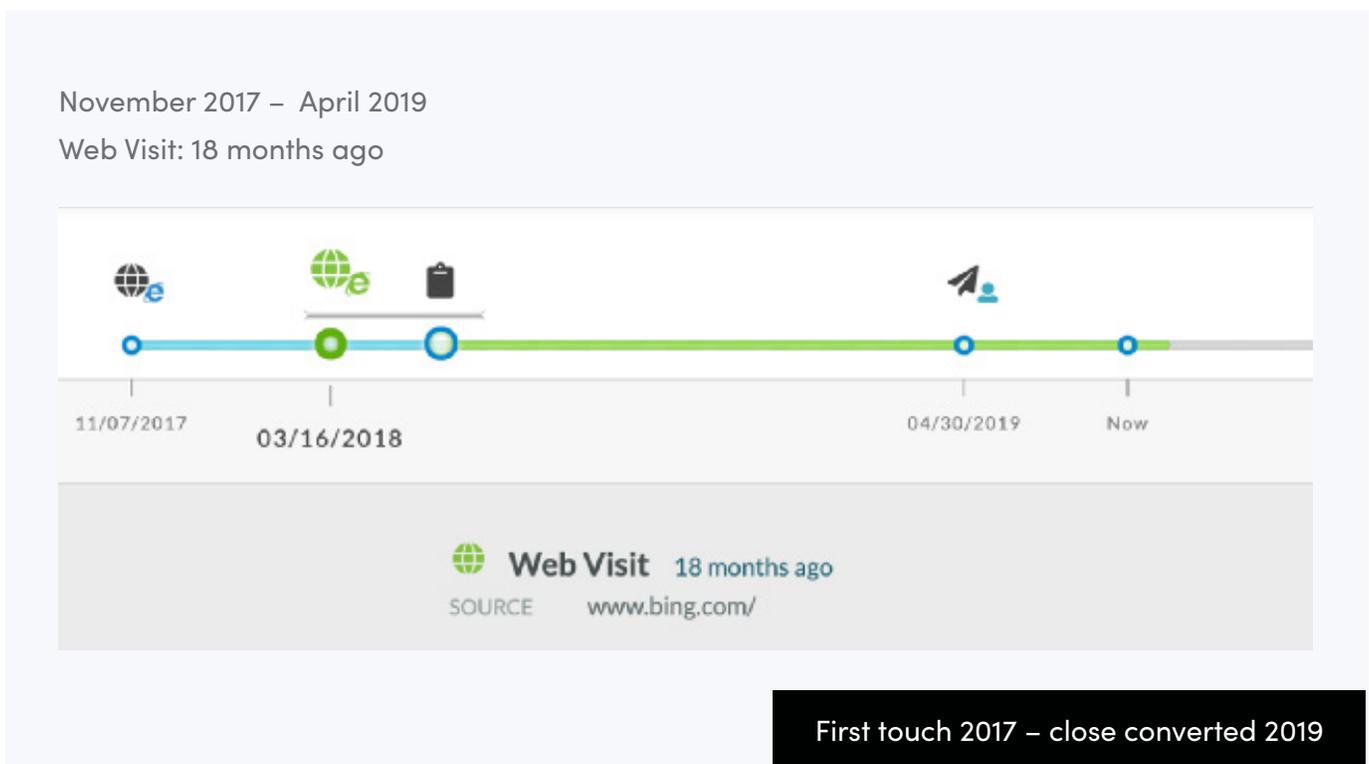
Then there are human element variables. When you think of the dozens of technologies we engage with every day, it's not uncommon for us to put something in a shopping cart, get distracted, come back three days later and say "oh yeah, I forgot about that." So there is a human element involved in purchasing behaviors, plus we're up against this evolving digital landscape and ecosystem.

New devices are coming out, new software, apps and technologies... it's changing so fast, every day. Also, we are looking at increased segmentation.



So more and more of these kinds of internet tribes are consumers who are having their own journeys or paths and what this really leads to is complicated trackability and scalability. Thanks to new technologies, we've come a long way, and we still have a long way to go, but it's moving in the right direction.

Real Life Example



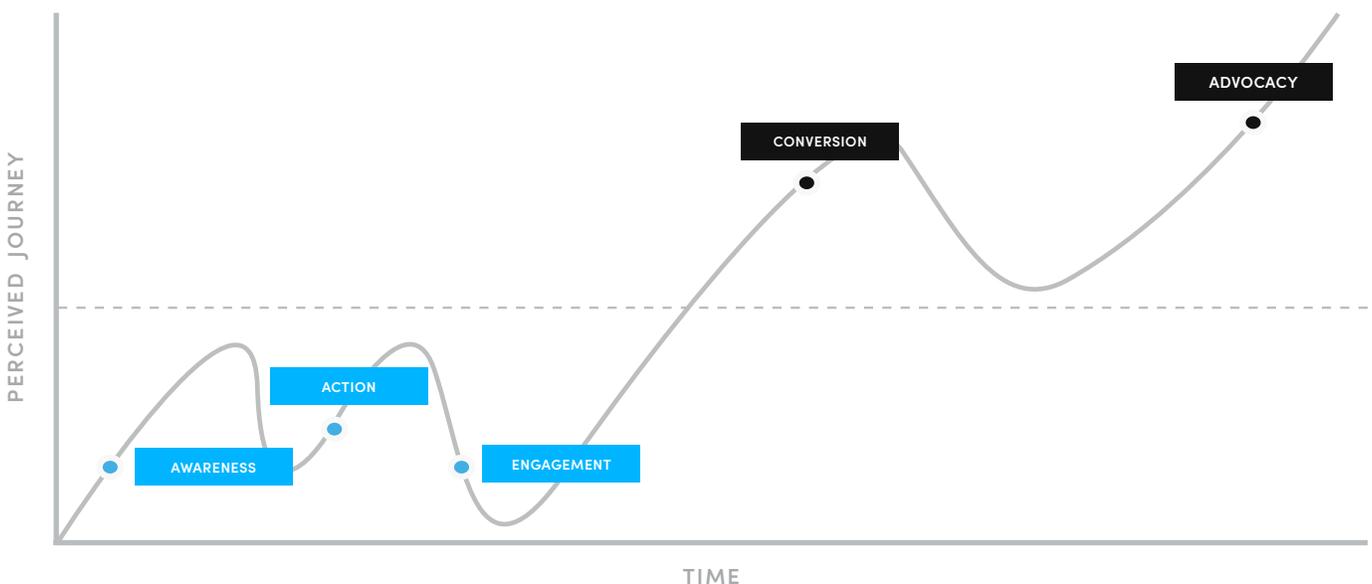
Here's a real-life customer journey that documents an 18-month duration. You can see the first touchpoint was through the IE browser, through Bing, and it was 18 months before this was a closed, converted lead.

When we're talking about the customer journey it's not like a very fast "I just turned on these ads and all of a sudden I'm getting a return on investment." It could take quite a while.

Predicting the duration of the journey

Some of the challenges that I've personally seen in my day-to-day at the agency are customer journeys on the same exact product or target market that can take 90 days or 380 days. We're up against things like data that is not connected; large organizations that operate in multiple silos; you have a lot of departments all doing different things. So IT might have one set of data and marketing might have another.

With small businesses, the issue is that they don't have enough support or technology yet to integrate, and this is hard because no two journeys are the same. There have been a lot of studies done on this and to date, they haven't been able to replicate the same journey twice. We did a study for a client and looked at 60 different journeys over a 12-month period and our findings were consistent with the studies really disparate journey paths.



Campaign Mapping

Getting started

How do you start mapping your campaigns, given how complicated this is? You need to get answers to these five questions:

1. What is the goal?
2. Who am I talking to?
3. What matters to them?
4. What are their steps in the decision-making process, and
5. How am I going to help them through that process?

The client needs to agree to goals and KPIs and understand that a campaign may not always produce a quick ROI.

Sometimes you have to figure out if the consumer is product aware, are they brand-aware, are they pain aware ... in order to push through and find their pain points, to make sure we're there in moments of relevance.

Data mining

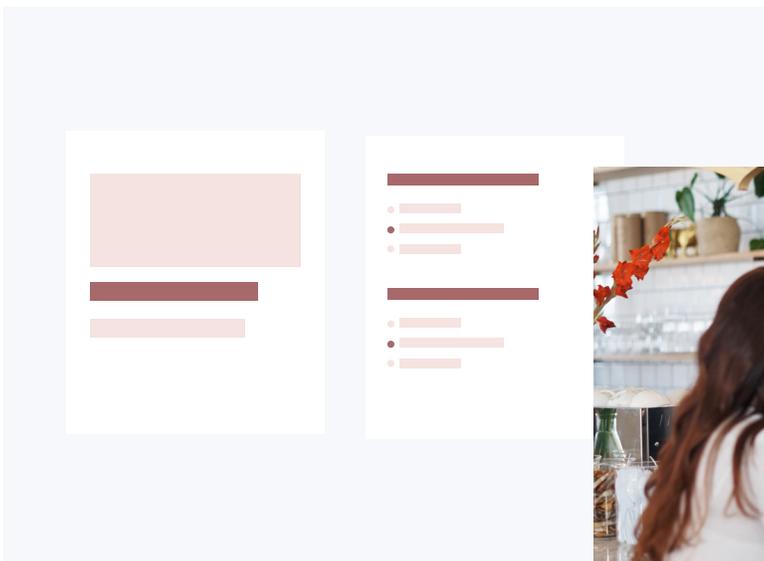
To do that, you need to understand your audience and there are a couple important things we need to look at in order to do that.

We need to look at data, we need to conduct some sort of interview and make some assumptions and generalizations upon start.

When we look at conducting interviews, we need to look not only within the client's organization, but also at samples of the market size, to really get a good understanding of them.

When we get into data, we need to look at what kind of historical data we already have. Do we have an email database that we can look into, do we have a customer list, analytics, past marketing materials or reports?

In every case, the more data, the better.

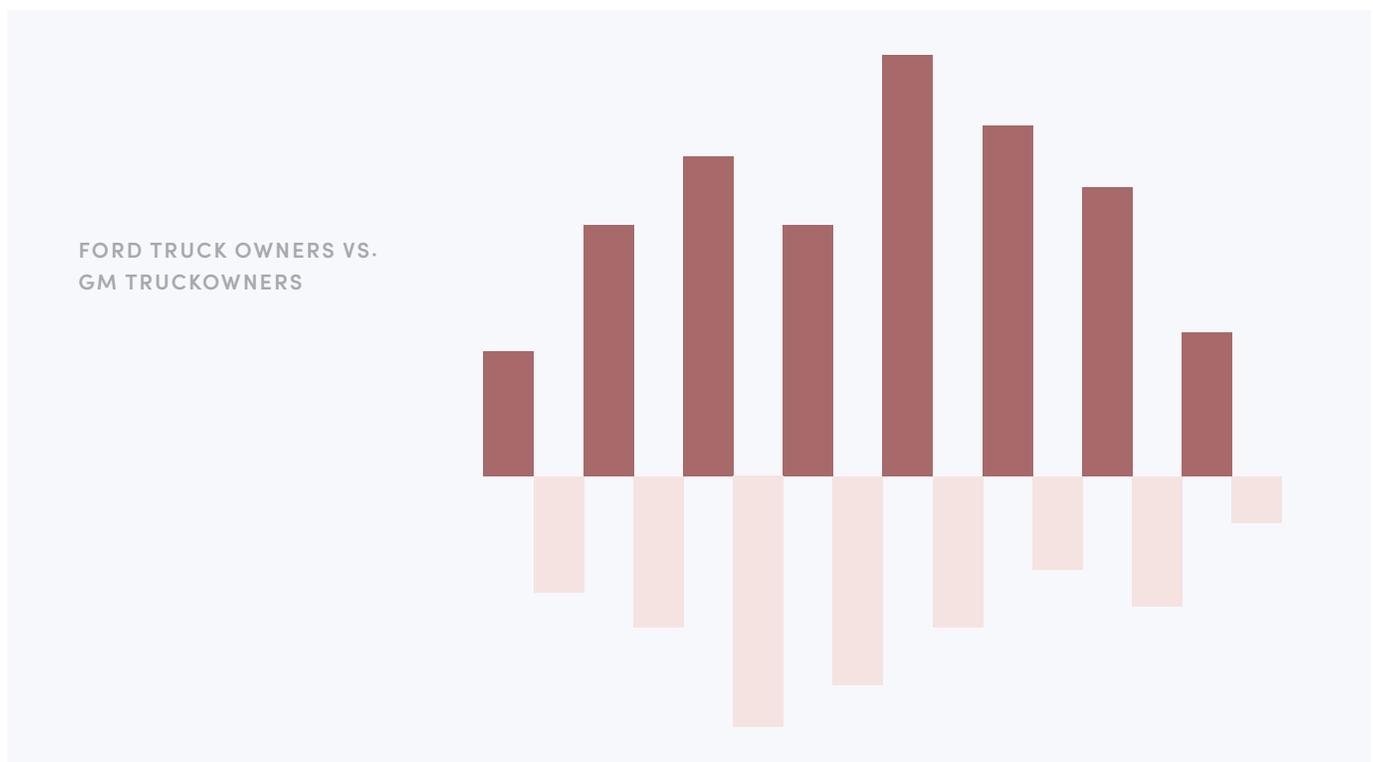


Extrapolating the data

And through that, you can start to look at those customers who have converted in the past. Maybe there are some correlations between the analytics and the in-market audiences.

We see this a lot, for example, in our work for an automotive client where we found that a lot of our “Made in the U.S.” messaging performed really well and then the analytics told us that they were Ford and GM truck owners who were purchasing based on a similar value set.

So it made a lot of sense when we were able to look at these two different data points together.



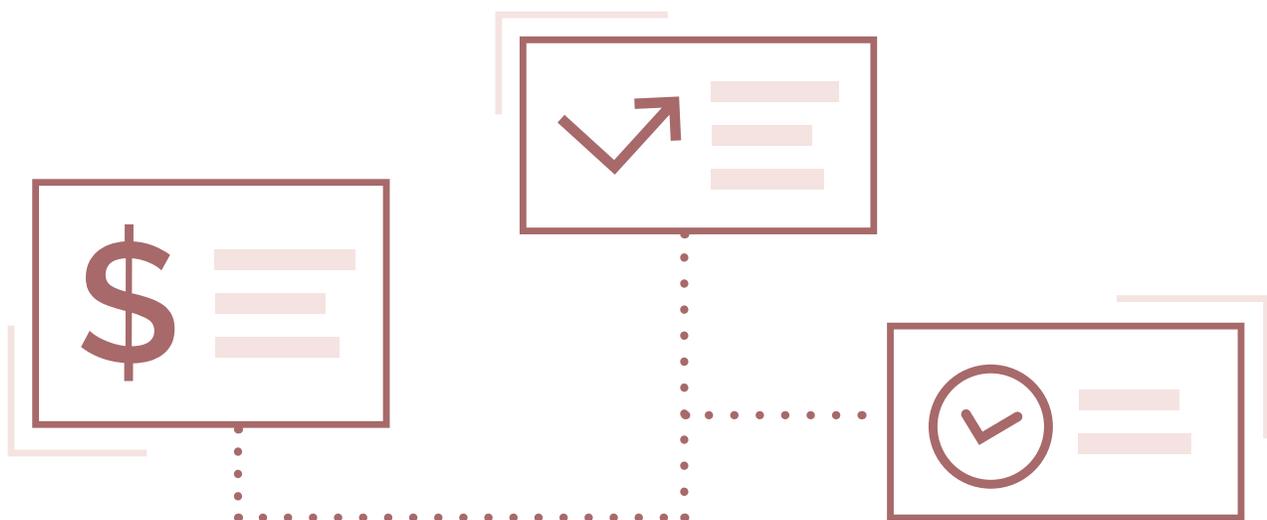
Smart spending

Budget expectations are a really big point, when you are talking about trying to communicate with your audiences. Certain channels are going to be more expensive depending on what you're trying to do.

There will be different opportunities and constraints depending on each one. So you have to test and upload. If you have lists like abandoned carts or customer lists based on affinity or custom-intent, upload them to the platform, see what comes back and find out what opportunities are there.

Some of the potential limitations you might run into are that the audience size is too small, which means we can't get the delivery where we want it to be; sometimes it's too large and we need to do a better job at segmentation.

Also, we have to consider GDPR and Compliance. For example, there has been a lot of chatter in the industry regarding medical compliances, so you have to ask "can I even use this list" and then know that your list size does need to be about 1,000 people to be able to serve ads. You may not have all the data yet, but keep collecting.



Strategic scheduling

After taking into consideration all the data and what you know about your audiences, you have to shift into funnel campaign-mapping to determine what is the content and the proper messaging?

What we do know is that search, social and content are happening at all phases of the customer journey. It's not just that search is top-of-funnel or display is awareness phase.

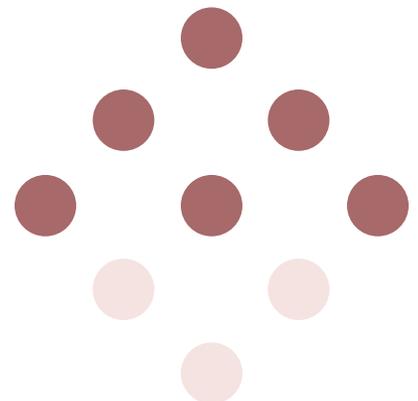
These interactions are happening throughout the customer journey, and it's critical to identify what is really important, so when we've created all of our content and we're ready to launch campaigns, we can make sure we're staging them out properly.

One mistake we see a lot is that people get really excited when they have everything ready and they want to release everything at once. But you have to be strategic. Maybe you should launch your display or programmatic campaigns first to collect audience pools or LinkedIn-promoted content to gain awareness.

Then you follow that up with sponsored in-mail or some sort of remarketing initiative that drops into an email or other drip campaign. All of these things really need to be more trigger-based and more systematically planned as opposed to launching everything at once.



Here is a sample media strategy that actually won a couple of awards for us at the agency and the real difference here was not necessarily the channels we used or how good the messaging was, but how well we spent the media, how we looked at the customer journey and then we played the customer journey and the media strategy together.



First 30-Day Media Plan

Goal: Increase Awareness

(High Funnel) Display	70%
(Mid Funnel) Search	20%
(Low Funnel) Remarketing	10%

We didn't ignore the other levels of the funnel but we really just pushed emphasis in the upper levels. After 30 days we pushed emphasis more toward the middle of the funnel, still negating the top-of-funnel initiatives but shifting focus a little bit.

After 30-Day Media Plan

Goal: Reach audiences most likely to convert

(High Funnel) Programmatic	30%
(Mid Funnel) Search	50%
(Low Funnel) Remarketing	20%

After 60 days and leading toward the end of the campaign, we shifted everything to the lower part of the funnel to really hit the conversions. And it was a huge success. It wasn't more media dollars, it wasn't different messaging, it was a better media strategy for the customer journey.

Funnel strategies

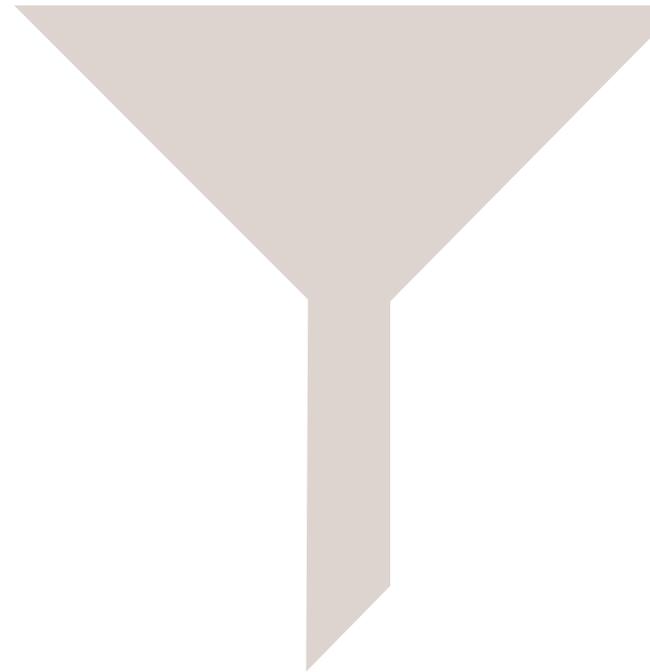
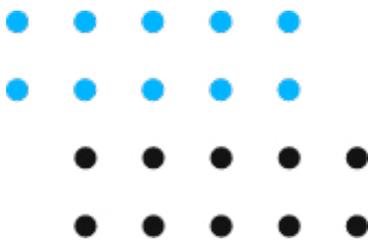
Let's talk about high- and low-funnel strategies with search. A lot of times I hear people say

“search, oh that's so top-of-funnel.”

Well, not always.

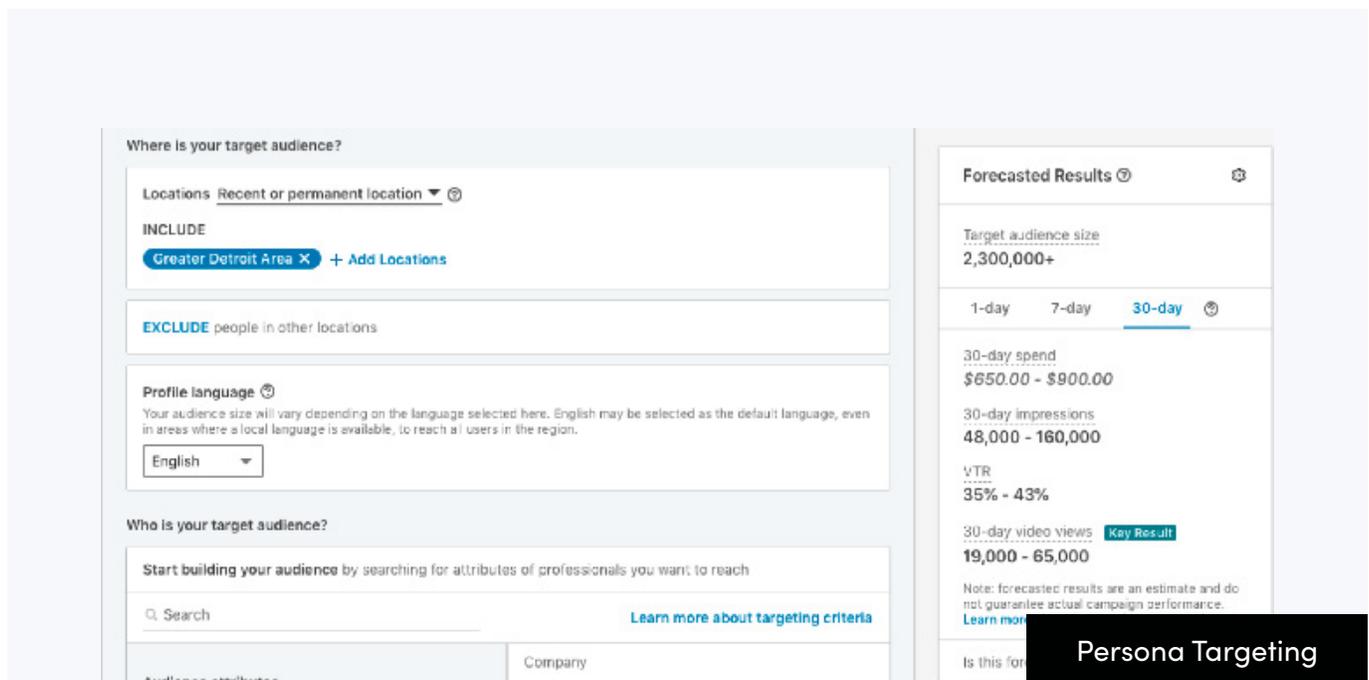
High-funnel search can include qualified search terms but within a large volume or larger audience size, so perhaps you get a longer conversion window, but it still will have a major impact in the long run.

Low-funnel search can use broader messaging with a smaller audience, so things like remarketing or in-market ads that are layered on top might have smaller volumes but shorter conversion-time windows.



Platform strategies

Some optimizations and best practices to share: platform testing with LinkedIn. As you get ready to create campaigns, test and build them in the platforms to see what you get. Is this audience large enough, is it qualified enough? **I highly recommend running 3-day engagement test campaigns to see what gets the higher engagement.**



This can really save you a lot of time and effort in the long run, and it will help you see potential reach.

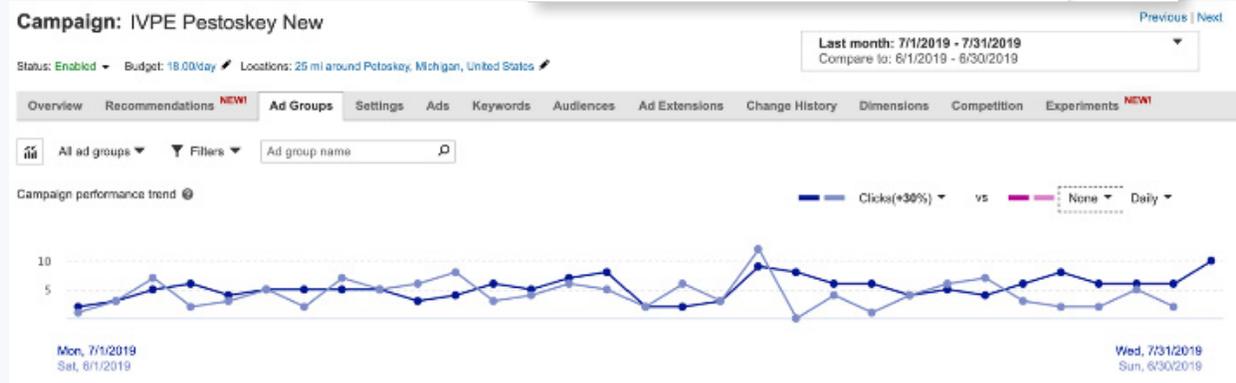
Recently we ran a recruiting campaign and we did persona targeting, so messaging was based on the skill-sets we were looking for, and then we also did competitive targeting.

We started out with persona targeting because the size of the audience was a lot larger, but as we started to run the competitive targeting, we found that our engagement rates were much higher although the size or volume was lower.

Initially we thought: “well there are more people here,” but that didn’t necessarily mean they were more engaged. So we ended up running more of the competitive targeting.

In comparing platforms, sometimes we assume we know what’s going to work better for a particular campaign or initiative; in this instance, we were able to see that our Bing local campaign performance was much higher than other search engines and we were able to make the case to move more of our funds focus to the Bing campaign.

Ad	Ad group	CTR	Avg. pos.
Overall total - 24 ads		1.92%	1.06
Senior Independent Living Petoskey, Michigan Personalized Senior Living www.independencevillages.com/petoskey-mi Live actively at Independence Village of Petoskey. A comfortable place to call home. Schedule a tour to learn about daily activities, private apartments and more.	Independent Living EM	30.77%	1.15
Scenic Retirement Location Petoskey, Michigan Independent Senior Living independencevillages.com/retirement Schedule a tour today at Independence Village of Petoskey to learn more. Enjoy the comforts of home without the stress of chores and yard work.		20.00%	



Compare Platform Performance

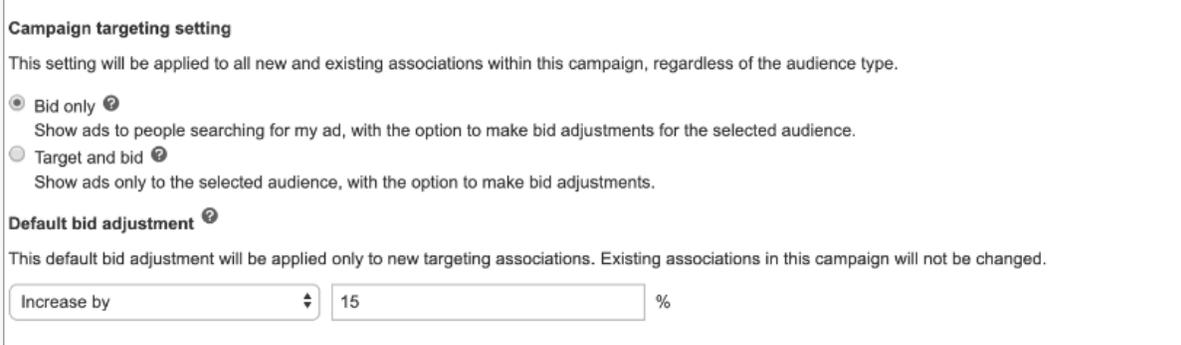
Tweaking

Settings are really important. A lot of people get tripped up on these, and little mistakes can have a big impact on campaign results.

Make sure that when you're testing new audiences, have that on "bid only," especially in the beginning, until you really understand them and you have a big enough pool to be able to do target-and-bid.

If you get into target-and-bid too soon, you won't be able to deliver.

Microsoft Settings



The screenshot shows the 'Campaign targeting setting' section of a Microsoft advertising interface. It includes a description, two radio button options for 'Bid only' and 'Target and bid', and a 'Default bid adjustment' section with a dropdown menu set to 'Increase by' and a text input field containing '15' followed by a percentage sign.

Campaign targeting setting
This setting will be applied to all new and existing associations within this campaign, regardless of the audience type.

Bid only ⓘ
Show ads to people searching for my ad, with the option to make bid adjustments for the selected audience.

Target and bid ⓘ
Show ads only to the selected audience, with the option to make bid adjustments.

Default bid adjustment ⓘ
This default bid adjustment will be applied only to new targeting associations. Existing associations in this campaign will not be changed.

Increase by ▾ 15 %

Campaign Targeting Settings

Performance Targets

These are really great when you're trying to hit a certain goal or KPI in your budget for specific campaigns. We set this up recently for a location campaign. We had certain targets that we wanted to hit for that.

Create performance target

Set goals for spend, clicks, and average CPC for your campaigns to achieve over a specified time period. [Learn more](#)

Name  Avon Lake Budget

Select campaign  Filters  Campaign name

Available campaigns: 46 Show data from: Last month  Add all 

Name	Spend	Clicks	Avg. CPC	Labels	
IVMID Midland New	38.53	27	1.43	-	
IVPL Plymouth New	97.34	67	1.45	-	
SPWV Waterville New	5,288.25	1,006	5.26	-	

Selected campaigns: 1

 Remove all

 IVAL Avon Lake New

Performance Targeting

Recommendations

Get more relevant traffic with broad match modifier keywords

Add the "+" broad match modifier to your keywords to fine-tune how the broad match is used in search results. [Learn more](#)

Weekly estimates after applied to 57 ad groups

Clicks	Spend
+640	+\$5,663.67
619 to 1,259	\$4,051.48 to \$9,715.15



[View keywords](#)

Keyword Recommendations

Recommendations can really help tell the story through data to direct what you need to do with your campaigns. These are very helpful, especially when you think about budget or when you need to go to a client or an internal team and say, "hey we really should be spending more ... look at the return we're getting here and this is how many more opportunities we get with a higher investment." These tools can really help with that.

The Competitive Arena

Competitive conquering involves making data-driven decisions on competitors. Not all competitors act the same way on all platforms, so sometimes competitors might be highly investing in one area but not investing at all in another. You can really outrank or outperform them with smarter marketing just by using the right data.

Display URL domain ?	Impression share ?	Avg. position ?	Overlap rate ?
You	97.06%	1.21	-
caring.com	18.28%	3.59	18.29%
senioradvisor.com	17.71%	2.74	17.77%
apartments.com	12.84%	3.50	12.82%
kensaq.com	10.44%	4.75	10.33%
seniorhomes.com	9.68%	3.66	9.71%
holidaytouch.com	9.24%		

Competitive Conquering

Key Takeaways

Don't let the data overwhelm you - choose which parts are important to your customer's organization and journeys.

Understand that this will not be perfect - no two journeys are the same so you have to look for trends and you have to make some generalization even with a ton of data.

But at the same time, **don't** drive completely blind - I see a lot of people make mistakes by just completely guessing that "well I think I should run this social campaign so I'm going to run social," when that might not be the right platform for them at all, and then also understand the constraints and roadblocks and try to find creative ways to work with them or around them.

Q+A

Q: Were there any campaign fails that you experienced or saw in your experience that you would be willing to share and talk through?

Amanda: Definitely. There are things you can't control sometimes as marketers when you're running campaigns. We saw a campaign where all of a sudden, our costs skyrocketed and the campaign results were dipping, and we couldn't figure out why from the campaign side.

What we found was that the client had installed a pop-up on the website that they didn't disclose, so it was actually affecting load times and messing with our quality overall. So our campaign dipped but it really wasn't anything campaign-related, so I think it is really important to look outside of just what you're doing to make sure you understand the big picture because those little things can matter.

Another campaign fail happens a lot to creative teams because of the way in which word comes down through the silo sometimes. We saw that new creative came through - again we saw delivery rates drop and thought, "what is happening here?"

We found out that the messaging on the ads had been changed and it no longer made sense for the user or what we were doing, and it went all the way through the queue and then we saw this downward motion, and it just wasn't meshing with the customers.

You have to find those opportunities to go back and tweak, and the great thing about digital is that we can address these pretty quickly.

Q: If AI is taking too long to perform, how are you convincing your client to keep trying it up to that 18-month mark which you suggested? That's a very long time period for people. What if they are looking for faster results in paid search than SEO, which often does have that longer performance timeframe?

Amanda: At SSDM, we try to be really upfront in the beginning. We've found that's key because, depending on the business, you have to set expectations right upfront. If you're looking at a business where it's a 2-3 year buying cycle, to expect that a 90-day campaign is going to turn into an instant sale, is probably not a realistic expectation. What we usually will do is set additional KPIs that are not just a

"closed lead." Is it subscribers, is it additions to a contact list, is it how many people have engaged with the brand? You have to set different KPIs depending on how long the journey is and what your overall campaign looks like.

Q: How can companies better align their internal teams and how does an agency fit into that?

Amanda: We spend a lot of time integrating with client sales and marketing teams. Sometimes we actually put some of the sales leaders and regional leaders together in a room and talk about those top-level initiatives to come up with creative ways to figure out together how to get to where we want to go, using the data as much as we possibly can to help push the envelope. That's been really successful for us and I think that's where we're seeing the most success for our clients as well.

Q: What AI tools or providers are marketers, search marketers using?

Amanda: We use a lot of different tools at SSDM. Every company we work with has a different martech stack, to be honest, and we play with what they have, so I don't know if I would say I have favorites. I have favorites for different things but I think what's important is that you do have the right data and the right software in place. So for example, if you have Salesforce, that's really only as good as your CRM. You really do need a Pardot or a Marketo to amplify that power to do the full customer-journey tracking. Hubspot and SharpSpring are also very good for some of the SMBs, but on a larger scale, Salesforce and Marketing Cloud are probably best.

Q: As marketers, how do we optimize AI machine learning to impact the customer journey?

Amanda: I would just say if you're looking to get started, if this isn't something you've done before, start by getting your teams together and looking at what you already have. If you've been doing this and haven't been able to figure it out yet, think about bringing in a Customer Journey Officer. This will have a huge impact because you really need someone who is big-picture focused. It's very hard to see the forest if you're in the trees and you're just doing display or you're just doing search. You really have to be able to come up for air and see the big-picture of what's happening within the organization.

**People do not
live in a silo,
so neither
should your
strategy**

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hello@ssdigitalmedia.com | 313.307.3154 | ssdm.co