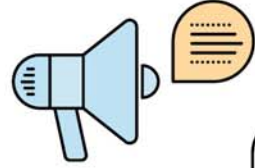




MARKETING



RELIABILITY

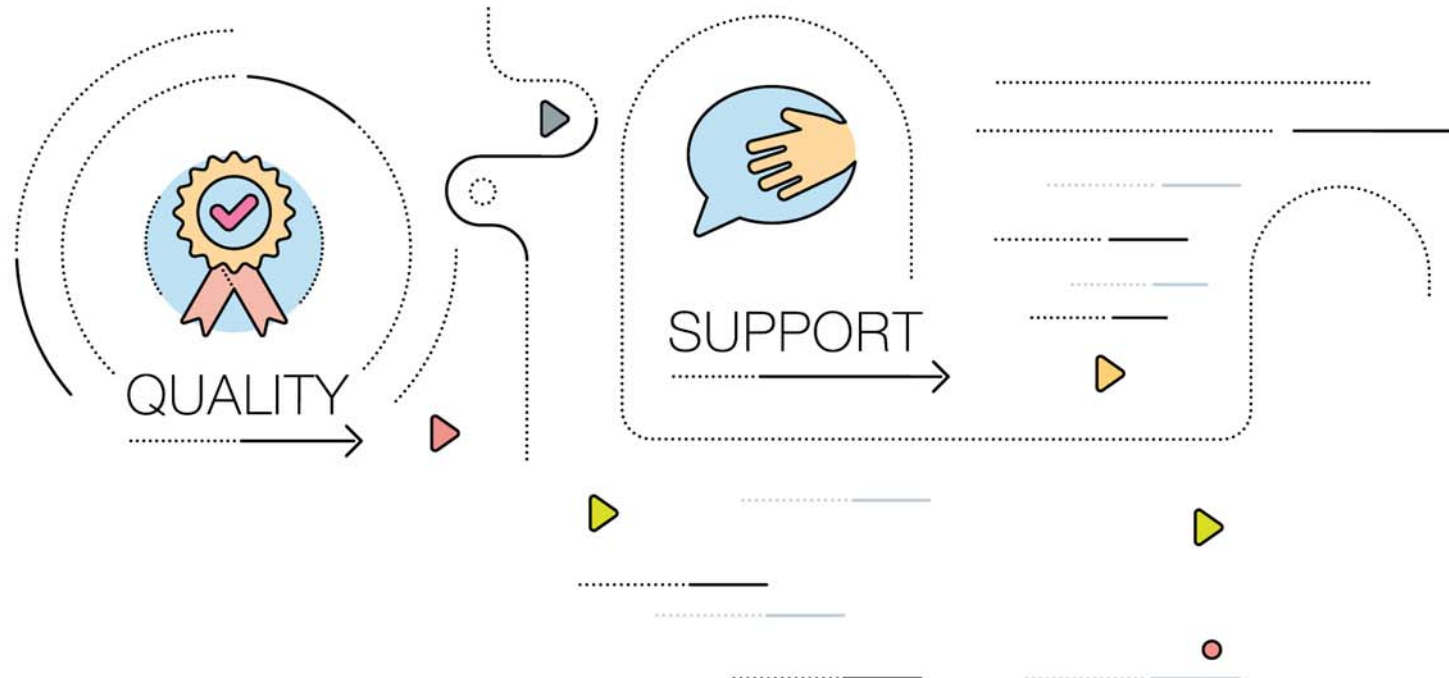
CRM metrics that matter

CRM 指標



SUPPORT

QUALITY



SATISFACTION



IMPROVEMENT

LOYALTY



SERVICE



The industry has come a long way since social media started making waves in the marketing world, and while many maintain – with good reason – that social media is a valuable tool in the box, many have come to realise it's not the be-all and end-all of modern marketing.

Instead, marketers are starting to look beyond what insiders are calling “vanity metrics” – metrics that make you feel great about your work, but that don't actually contribute meaningful data about the success (or lack thereof) of a campaign.

Additionally, with the proliferation of e-commerce, an online presence and omni-channel marketing, marketers are swimming in data.

So much data, in fact, that many marketers have no clue where to even begin dissecting and analysing the wealth of information they have hoarded from different touch-points, nor any clue how to consolidate and unify the data.

Ninety two per cent of marketers agree that data management is an integral part of their business, but a staggering 40% of marketers admit to not having the right expertise or know-how to make sense of the data they have, let alone how to automate it, according to the 2017 data-driven marketing report by Jaywing, and only one in five are using advanced attribution models to measure marketing effectiveness.

It's a classic case of being unable to see the forest through the trees.

This Master Report, in collaboration with XGATE, will dig into how to turn your information into insights; how to turn your data swamp into a gold mine; and how to make your CRM work for you, rather than the other way around.

自社交媒體在市場推廣行業掀起熱潮至今，行業已經經歷很多的轉變。儘管很多市場推廣人員仍然確信社交媒體是一項有價值的工具，但亦開始明白它並非現代市場推廣的必殺技。相反，市場推廣人員的目光已開始超越行內人所謂的「虛榮指標」，這些指標能令人自我感覺良好，但實際上並不能提供有意義的數據來衡量推廣活動是否成功（或存在缺點）。

此外，隨著電子商務、網上業務及全渠道營銷興起，市場推廣人員正淹沒在龐大的數據之中。事實上，面對從不同接觸點收集到的豐富資訊，許多市場推廣人員根本不知該從何入手進行研究及分析，亦不知道該如何整合及統一數據。根據Jaywing發表的2017數據主導營銷報告顯示，92%的市場推廣人員同意數據管理是其業務不可或缺的一部分，但令人驚訝的是，40%的市場推廣人員承認缺乏正確的專業知識或技術來理解其擁有的數據，亦只有五分之一的市場推廣人員會使用高級歸因模型來衡量市場推廣效果。單是理解數據都已經這樣困難，更遑論要實行市場推廣自動化。

這正是見樹不見林的典型例子。

在今期「Master Report」專欄，《Marketing》與XGATE共同深入探討如何將訊息轉化為洞悉、如何將數據沼澤轉化為金礦、以及如何確保客戶關係管理策略行之有效

BROUGHT TO YOU BY:



MARKETING ROI: FOCUS ON CRM METRICS THAT MATTER

市場推廣投資回報率：著眼於關鍵客戶關係管理指標

Know the different metrics for different objectives

From data to insights and strategies, to how each marketing campaign is accurately tracked to measure business performance, CRM managers struggle to make sense of the data swamp they are in. The key is to define the business objectives and identify the right metrics to tell a story. The first step is to separate vanity metrics from those that help CRM managers make business decisions. For instance, the number of fans, followers, likes, impressions, etc, are useful for understanding brand/product awareness and interactions, but they do not offer data insights to calculate the impact on sales and revenue if your goal is to grow profitability.

At XGATE, we look at five CRM metrics that help marketing managers understand business performance more effectively.

Five key CRM metrics for marketing ROI

Using a life cycle approach, customers (or members) can be segmented into distinct groups – leads, first-time buyers (FTB), active members, churning members and inactive members. There are essentially five sales conversion metrics that will allow CRM managers to effectively measure the success of marketing results.

1. Conversion rate: The first metric in any leads-to-sales campaign will simply be the conversion rate. That is, to measure the number of leads converted into customers (or members) from various channels such as search marketing, website, Facebook, email marketing, mobile marketing, etc.

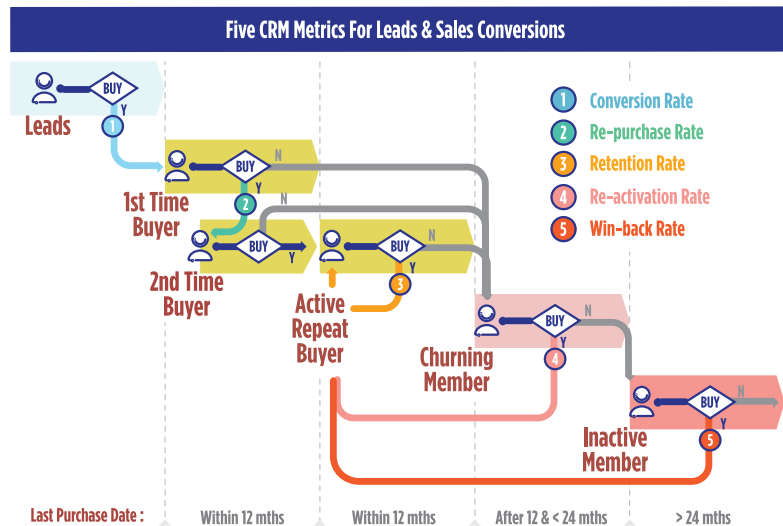
Once a lead becomes a member, he is tracked as a first-time buyer (FTB). A leads-to-sales conversion rate can be calculated on a 60, 90 or 180-day trailing period basis, but

subsequent purchase behavioural metrics may take a longer trailing time frame.

2. Repurchase rate: Once an FTB makes a second transaction within a 12-month period (typical sales cycle for most retail businesses), he would be classified as an active member. The metric to measure this conversion behaviour is called the repurchase rate. This is represented by a member making a second purchase in figure 2. Meanwhile, it is also possible for this FTB not to buy a second time because he switched brands or was not happy with his first shopping experience. In this case, he would be classified as churning and inactive member after 12 and 24 months of no purchase activity respectively.

3. Retention rate: For CRM managers, the most important metric for reporting is the retention rate because it shows how loyal your members are. This metric is derived from calculating active members with two or more previous transactional records of making purchases. An important factor in this measurement is recency of the last transaction.

4. Reactivation rate: This metric allows CRM managers to understand how successful a retention programme is at re-engaging its members. A churning member is defined as an existing member with a past purchase history, but has recently left a brand. His last purchase record is typically over 12



了解不同目標的不同指標

從數據到洞悉及策略、以至如何準確追蹤每項市場推廣活動來衡量業務績效，客戶關係管理經理身陷數據沼澤之中，苦於理解其背後的意義。要從海量的數據之中獲得洞悉，關鍵在於要釐清業務目標，並選擇正確的指標來進行分析。

第一步是將「虛榮指標」，與有助客戶關係管理經理作出業務決策的指標分開。例如粉絲、關注者、讚好、瀏覽次數等數字有助了解品牌/產品的知名度及互動率，但如果目標是提升盈利，這些數據將無法提供有用的見解來計算市場推廣活動對銷售及收入的影響。

XGATE分析五項有助市場推廣經理更有效理解業績的客戶關係管理指標。

衡量市場推廣投資回報率的五大關鍵客戶關係管理指標

運用生命週期方法，顧客（或會員）可細分為不同的群組：潛在顧客、首次買家（FTB）、活躍會員、流失會員和非活躍會員。基本上，有五個銷售轉換指標有助客戶關係管理經理有效地衡量市場推廣的成效。

1. 轉換率：轉換率是計算任何客戶推廣活動的第一個指標，也就是說統計從搜索營銷、網站、Facebook、電郵營銷、手機營銷等各種渠道轉化成顧客（或會員）的潛在顧客數目。

當潛在顧客成為會員，就會視之為首次買家（FTB）來進行追蹤。潛在顧客變成顧客的轉換率可按60天、90天或180天追蹤時間的基礎來計算，但隨後的購買行為指標可能需要用更長的追蹤時間來計算。

2. 回購率：當首次買家在12個月內（大多數零售業務的典型銷售週期）進行第二次消費，他將被歸類為活

Members At Different Lifecycle Stages

Leads (or Prospects)

Sign up leads form (ie eNews) and no previous purchase record



1st Time Buyer (FTB)

Made 1x purchase in the last 12 months; with no prior purchase record previously



Active Members

Comprise of 2nd Time Buyers and Active Repeat Buyers making 2 or more purchases respectively within the last 12 months



Churning Members

Made at least 1 purchase, with the last purchase over 12 but less than 24 months



Inactive Members

Made at least 1 purchase with the last purchase over 24 months



months, but less than 24 months. When this churning member makes a purchase due to some promotional offers or campaign activity, his status changes back to active member and his purchase will be counted into the reactivation rate (as shown in figure 2).

5. Win-back rate: A metric relatively similar to reactivation rate is the win-back rate. When a churning member continues to show no purchase activity after 24 months, he automatically becomes an inactive member. Due to the last purchase record having been over 24 months, the performance for win-back rate is usually not high. However, if an inactive member (shown in figure 2) makes a purchase, his status will change to active member. Hence, his transaction is recorded as a win-back sale.

How to improve your CRM metrics performance

Beyond looking at the CRM metrics from leads

or repeat sales conversion rates, the absolute number of conversions are of equal importance in providing insights. CRM managers need to look at the health state of their member base growth. Knowing your member base is growing slower than the churn numbers over time alerts you to come up with marketing tactics to improve leads conversions, address "leaky buckets" or conduct survey campaigns to understand the churn reasons.

As a digital marketing practice matures with better BI and data analytics, identifying the right CRM metrics and understanding customer value at various stages of the customer life cycle are essential for good business decisions.

Combining these metrics with predictive analytics and marketing automation, the data intelligence derived can be remarkable.

Stop being confused by big data; take clear steps to translate your data swamp into CRM metrics that effectively drive your marketing efforts to achieve business profitability.

躍會員，而用來衡量這種消費行為的指標稱為回購率，圖2以第二次消費的會員為代表。同時，首次買家也有可能因為轉買其他品牌，或不滿意第一次購物體驗，而不再進行第二次消費。在這種情況下，當他在其後12和24個月內沒有購買活動，他便會分別被歸類為流失會員和非活躍會員。

3. 顧客保留率: 對客戶關係管理經理而言，最重要的報告指標是顧客保留率，因為這反映出會員對品牌的忠誠度。該指標會計算有兩次或多次購買記錄的活躍會員的消費，而其中一項重要測量因素，就是最近一次的消費。

4. 重新激活率: 該指標有助客戶關係管理經理了解其顧客保留計劃，對重新吸引會員的成效。流失會員是指過去有購買紀錄、但最近沒有光顧品牌的現有會員，其最後一次購買紀錄通常已超過12個月，但少於24個月。當流失會員由於某些促銷優惠或推廣活動而再次購買產品，他的狀態便會變回活躍會員，而其消費將計入重新激活率之中（見圖2）。

5. 顧客贏回率: 與重新激活率相類似的指標，是顧客贏回率。如果流失會員在24個月後仍然沒有任何購買活動，他會自動變成非活躍會員。由於距離最近一次購買紀錄已超過24個月，其顧客贏回率通常不高。但一旦非活躍會員（見圖2）進行消費，其狀態將變成活躍會員，其購買紀錄便會計入顧客贏回銷售額之中。

如何提升客戶關係管理指標成效

除了留意潛在顧客或重複銷售轉換率的客戶關係管理指標，實際轉換數字同樣可以提供重要的洞悉。客戶關係管理經理需要留意會員人數增長的健康狀況，會員人數增長逐漸落後於流失顧客人數是一個警號，提醒你要構思市場推廣策略以提升潛在顧客轉換率、解決「漏水桶」問題、或進行調查以了解顧客流失原因。

隨著數碼市場推廣方式趨成熟，加上更佳的業務情報及數據分析，在顧客生命週期的不同階段識別正確的客戶關係管理指標及了解顧客價值，是作出良好業務決策的關鍵。將這些指標與預測分析及市場推廣自動化結合起來，所獲得的數據情報將非常顯著。因此不要再被大數據迷惑，採取明確的步驟，將數據沼澤轉化為客戶關係管理指標，從而有效推動市場推廣工作，以實現業務盈利目標。

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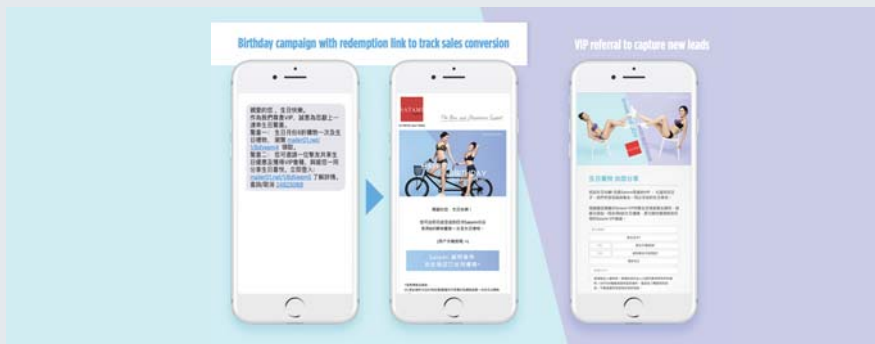


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CASE STUDY 個案分析

SATAMI – THE BRA AND SHAPE WEAR EXPERT

Satami內衣專家



Satami主力透過客戶關係管理營銷，進行數碼轉型以拓展業務。

品牌：成立於1985年，Satami一直專注設計及生產具修飾和改善女性體態的功能性內衣，並提供貼心的試身服務。該品牌擁有專業深厚的內衣知識，務求為不同女性提供最貼合她們需要的功能內衣，以展現她們的自信及內在美。

挑戰：鑑於傳統渠道的局限性，Satami從傳統市場推廣方式，轉型至數碼客戶關係管理營銷方式，因此需要更有效的方法來衡量其成效。單靠零散的數據，是不可能追蹤各數碼渠道（搜索引擎營銷、顯示廣告、社交媒體、手機及網站）的市場推廣投資回報。而缺乏適當的數據洞悉，亦難以迅速因應市場變化來調整客戶關係管理營銷策略，並有效地提高銷售轉換率。

目標：Satami希望利用現有數據，挖掘能夠支持其數碼轉型計劃的洞悉。他們希望透過市場推廣自動化，靈活地與顧客溝通，然後運用可準確追蹤及衡量投資回報的指標，來測量客戶關係管理營銷方面的投資，以實現其業務目標。

解決方案：XGATE專注透過具體的關鍵成功要素，來支持Satami的數碼轉型策略：

- 整合雙方的數據，令文檔共享變得更方便（包括交易數據、顧客資料、業務報告等），然後將數據轉化為可行的市場推廣洞悉
- 採用客戶關係管理指標，追蹤及提高不同數碼客戶關係管理推廣活動的業績
- 運用市場推廣自動化來推出客戶關係管理推廣活動（例如吸引潛在顧客、歡迎訊息、生日祝賀等），以提高市場推廣效率，並運用XGATE的5As生命週期方式，為顧客生命週期增值。

結果：客戶關係管理指標讓Satami能夠更好地了解顧客對品牌的忠誠度，以及其消費行為的活躍度。多渠道自動化推廣活動可透過電郵鎖定顧客，如果顧客在電郵發出後五天仍未回覆，系統會自動傳送有關活動或優惠訊息的手機短訊提醒顧客。由於客戶關係管理指標的追蹤接近即時，因此能夠準確測量市場推廣的投資回報率。事實上，客戶關係管理推廣活動成功令潛在顧客增長7%，而單計來自生日推廣活動的銷售轉換率，已達到30%的相對較高水平。

Satami's digital transformation journey focused on CRM marketing to grow the business.

The brand: Established in 1985, Satami specialises in the design, production and fitting of lingerie and garments with both shaping and body maintenance functions. The brand is a knowledgeable lingerie expert, which aims to provide a perfect fit for women; and bring out the confidence and beauty inside them.

The challenge: As Satami moved from traditional to digital CRM marketing because of the limitations of traditional channels, it needed a more effective way to measure the success of its transformation journey. Tracking the marketing ROI across digital channels (SEM, display, social, mobile and web) is close to impossible with data sitting in silos. Managing CRM campaigns without proper data insights also made it difficult to respond quickly to market changes and improve sales conversions effectively.

The objective: Satami wanted to leverage existing data to mine for insights that could support its digital transformation plan. It wanted to adopt marketing automation to achieve a flexible approach to communicating with its customers and then use metrics that could track and measure

ROI accurately for the investment made in CRM marketing to achieve its business goals.

The solution: XGATE supported Satami's digital transformation strategy by focusing on specific key success areas:

- Integrate data between both partners to facilitate the ease of file sharing (transactional data, customer profile, business reports, etc.) Then translate that data into actionable business insights for marketing.
- Implement CRM metrics to track and enhance business performance over time across different CRM digital campaigns.
- Use of marketing automation to launch CRM campaigns (leads capture, welcome, birthdays, etc) to enhance marketing efficiency and grow the customer life-time value using XGATE's 5As life cycle approach.

The results: The CRM metrics allowed Satami to better understand its customer level of loyalty and activity in regards to purchase behaviour. The automated campaigns using a multi-channel approach mean a customer can be targeted with an email, and if she doesn't respond after five days, she will be reminded with an SMS message for the event or promotion. With CRM metrics being tracked in near real-time, marketing ROI can now be measured accurately. CRM campaigns have seen new leads grow by 7%; while sales conversions from the birthday campaign alone reached a relatively high average rate of 30%.

XGATE DMS

4 Pillars of CRM Marketing Automation

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Connect data to create smart segments. BI & AI algorithms to predict & optimise.



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DIGITAL MARKETING SERVICES

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ADOPT
ATTEMPT
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CUSTOMER LIFECYCLE

Mapping lead and customer segments across the lifecycle stages



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