

MARKETING AUTOMATION

市場推廣自動化

BRANDS WHICH UNDERSTAND THE COMBINED POWER OF MARKETING AUTOMATION AND CRM SYSTEMS ARE MOVING EARLY ON A SPACE THAT WILL RESHAPE THE MARKETING INDUSTRY IN THE YEARS AHEAD. SO IS IT AS COMPLEX AS IT SOUNDS? SURPRISINGLY NOT.

一些品牌洞悉市場推廣自動化與客戶關係管理結合的力量，並率先進軍這個領域，將於未來數年改變市場推廣行業的景觀。這項技術聽起來很複雜，但事實並非如此。

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YOU BY:



“BECAUSE PROGRAMMATIC BUY HELPS TARGET ONLINE CUSTOMERS INCREASINGLY SEGMENTED BY PLATFORMS, IT IS ASSUMED TO BE AN ATTRACTIVE FORM OF BUYING FOR DIGITAL MARKETERS.”

「程序化購買有助鎖定愈來愈分散於不同平台的網上顧客，被視為對數碼市場推廣人員具吸引力的廣告購買模式。」

The explosion of data and digital technologies has opened up an unprecedented level of insights into customer behaviour that only a decade ago we may have shrugged off as impossible.

At the heart of this is a new wave of marketing technology that has the potential to completely transform the way companies communicate with customers and potential customers.

Programmatic buying, or automated media buying, is a hot topic in the world of media. eMarketer estimates that programmatic buying will skyrocket to US\$9 billion by 2017, driven by the marriage of data, insights, CRM and technology.

While programmatic buying in the US and European markets has evolved at a healthy rate, many in Asia are still in test-drive mode.

Across Asia, marketers remain wary about the merits of programmatic. But a string of mergers and acquisitions in the ad tech space in recent months shows the tide may be turning.

Programmatic buying is a kind of media buy conducted by machines that allows for audience optimisation, allowing you to track customers during their journeys throughout the web, and ideally, towards purchase.

The data made available through tracking users allows for real-time analysis of the performance of display ads and AB testing of creatives. Programmatic buying can be done for all verticals – from display ads on social media and mobile to videos.

In Hong Kong, the likes of the AIA, DBS Bank and Fonterra brands have seen marketing automation technology transform the way they communicate with customers and potential customers, by allowing them to pinpoint consumers at scale with search, email, mobile, social and other digital platforms.

Some of the early movers in the

programmatic space are brands in the travel, commerce, finance and automobile industries.

The traditional display ad is the most established form of ad placed through programmatic buying in Hong Kong, with mobile being the next fastest growing vertical.

But while it may be slow to take off, there is a recognition that in APAC growth of programmatic buying will be even faster than the US. Opportunities for programmatic buying lie in social media ad technology and programmatic buy consultancy work.

The obvious driver of growing digital spend is the migration of customers online.

Because programmatic buy helps target online customers increasingly segmented by platforms, it is assumed to be an attractive form of buying for digital marketers.

TV is a marketing platform capable of hitting the masses with marketing messages. However, as consumers go multi-screen, the reach of TV for every extra unit of TVC displayed decreases, with marginal profits plateauing after the masses are reached.

This makes TV less capable of reaching light users, who are frequenting digital channels. Programmatic is attractive at that point because it makes that small amount of digital spending even more efficient.

In the future, we can expect multi-screen campaigns where a tablet ad could be triggered after a TVC is broadcast on television. Factors in the external business environment matter for the future of programmatic buying in Hong Kong. For programmatic buying to take off in Hong Kong, the media buying industry needs to educate staff, clients and media vendors or publishers about the value of programmatic buying.

It's a brand new world of advertising, but one which will give marketers a new level of accountability. 

過去十年，隨著數據及數碼科技的出現，為深入洞悉客戶行為開闢了前所未有的機遇。

嶄新的市場推廣技術可徹底改變企業與客戶及潛在客戶溝通的方式，成為當中的關鍵。

程序化購買，又稱自動媒體購買，是現今媒體世界的一個熱門話題。eMarketer預測，隨著數據、分析、客戶關係管理及科技互相結合，程序化購買業務將於2017年飆升至90億美元。

雖然程序化購買在歐美市場已穩步發展，但在許多亞洲地區仍處於試驗階段。

對於程序化購買的優點，亞洲的市場推廣人員仍持審慎態度，但廣告科技領域近月的一連串併購，顯示趨勢可能正轉變。

程序化購買透過機械購買媒體廣告，藉此進行受眾優化，追蹤客戶的網絡行為，並在理想的情況下促成消費。

通過追蹤用戶所得的數據，可即時分析顯示廣告的成效及進行AB測試。程序化購買可應用至所有垂直廣告，包括社交媒體及手機的顯示廣告、以至影片等。

在香港，友邦保險、星展銀行及恆天然品牌已透過市場推廣自動化來改變與客戶及潛在客戶溝通的方式，並藉此發掘搜索、電子郵件、手機、社交媒體及其他數碼平台的消費者。

一些率先進軍程序化購買領域的品牌來自旅遊、商業、金融、汽車等行業，傳統顯示廣告是香港程序化購買發展最成熟的廣告模式，而流動廣告將會是下一個發展得最快的垂直廣告模式。

儘管起步緩慢，但行業普遍認為亞太地區的程序化購買增長將比美國更快，而社交媒體廣告技術及程序化購買諮詢工作提供最大機遇。


整合網上顧客是推動數碼支出增長的主要動力。

程序化購買有助鎖定愈來愈分散於不同平台的網上顧客，被視為對數碼市場推廣人員具吸引力的廣告購買模式。

電視是一個能夠將宣傳訊息傳遞給大眾的推廣平台，然而，隨著消費者使用多種屏幕，電視廣告的接觸面減少，而接觸大眾後所得到的邊際利潤亦停滯不前。

這使得電視難以接觸經常使用數碼渠道的用戶，而程序化購買可以少量的數碼支出達到更大的成效，因此別具吸引力。

展望未來，多屏推廣將成為趨勢，例如電視廣告播出後，平板電腦廣告亦隨即啟動。外部經營環境因素對程序化購買在香港的未來發展非常重要。程序化購買要在香港起飛，媒體購買行業需要向員工、客戶及媒體供應商或發行商灌輸程序化購買的價值。

這是一個全新的廣告世界，市場將迎接全新的責任。 

THE FOUR BUILDING BLOCKS TO MARKETING AUTOMATION

市場推廣自動化的四大基本要素

With so much news in the past two years talking about how marketing automation will change the world (in a digital marketing sense), it is probably no longer news today since the phenomenon has already taken hold.

Marketing automation software generated US\$3.64 billion worldwide in 2014, according to MarketsandMarkets research and is projected to reach US\$5.5 billion by 2019. It's easy to see why CRM marketing automation is popular. Essentially, it enables brand managers to attract new leads, convert leads to customers, and build loyalty with better business results.

Technically, this implies a tight integration of CRM systems with a marketing automation platform to allow the transfer of lead information seamlessly between marketing and sales and ensuring the right messages are delivered at the right time based on data insights.

Ultimately, better alignment across organisational functions (such as customer care, marketing and sales) will improve the effectiveness of CRM marketing.

However, like any marketing tool, you need to know how to use it effectively. To build stronger customer relationships, with personalised messages, targeting customers at the right time and place using the right communication channel, is not a simple task.

You'll need a step approach starting with unified customer data, segmentation filter, customer life cycle and marketing automation to deliver digital marketing precision.

1. Unified customer data

Building a centralised customer database is a foundational element of the marketing technology stack. Many brands still struggle to connect the data-dots between systems. Only when the data is integrated to provide meaningful information, can CRM managers build a consistent understanding of customers'

past events, behaviour or preferences for better targeting and personalisation of future interactions. Essentially, joining CRM, transactional, behavioural and social data in a single environment, will require strong technical capabilities and integration of systems to support marketing needs for customer insights.

2. Segmentation filter

Having a powerful filter to connect the unified customer data and create smart customer segments based on cross-data analysis is essential for brands to deal with the constantly changing digital consumers. By applying different filtering criteria based on specific rules, you can create dynamic segments that can align with the right marketing actions.

3. Customer life cycle

Mapping the customer segments to a life cycle process allows you to clearly design the right CRM marketing campaigns to target your customer segments effectively. In the "Four building blocks to the success of future CRM marketing automation" diagram, we show how dynamic segments are mapped to an XGATE 5As customer life cycle approach. At each stage of the life cycle, different marketing automation programmes or plays will then be introduced with the aim to evolve the target segment from leads to customer and brand promoters.

4. Marketing automation

A seemingly simple task such as uploading CRM data on a recurring schedule into an email marketing platform before launching a campaign can be challenging for some organisations. Increasingly, they also need better ways to qualify leads/customers for selling/up-selling opportunities, run programmes across multiple channels, personalising communication messages based on behaviour and tracking

過去兩年，市場上充斥着市場推廣自動化將如何（在數碼營銷層面）改變世界的討論。毫無疑問，市場推廣自動化已成為現時的大趨勢。

根據MarketsandMarkets的研究顯示，市場推廣自動化軟件於2014年賺取的全球收入達36.4億美元，預計到2019年將達至55億美元。

客戶關係管理營銷自動化能夠讓品牌經理吸引新的潛在客戶、將潛在客戶轉化為客戶、以及建立客戶忠誠度以取得更佳業績，因此成為大趨勢是理所當然。

從技術層面來說，這表示客戶關係管理與市場推廣自動化平台的緊密結合，讓市場推廣與銷售部門可以互相交流潛在客戶資料，並根據數據洞悉確在適當的時間傳遞適當的訊息。

最終讓各企業部門（如客戶服務、市場推廣及銷售）能夠更好地互相協調，從而提升客戶關係管理營銷的成效。

然而，跟任何市場推廣工具一樣，如何妥善運用才是最重要。要透過個人化的訊息建立更穩固的客戶關係，在適當的時間和地點採用適當的溝通渠道來鎖定客戶並非一件簡單的事。

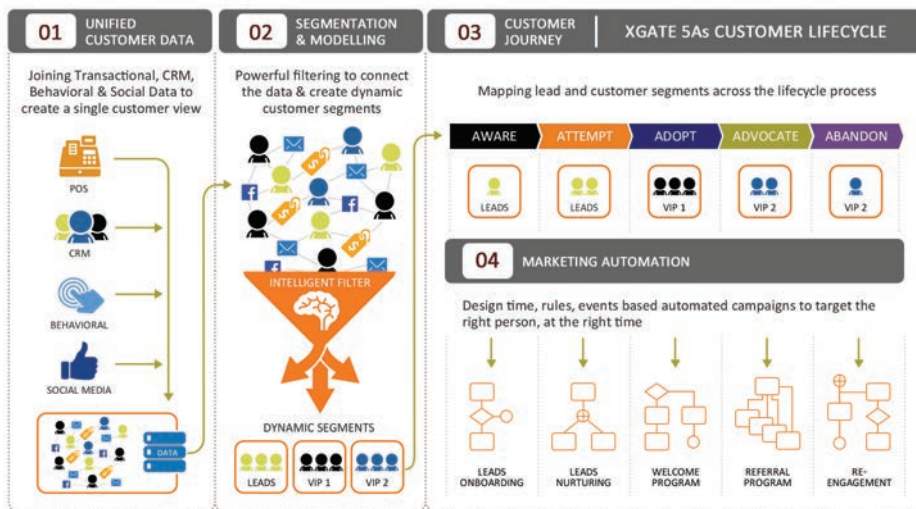
因此，必須採取循序漸進的方式，從統一客戶資料數據開始，到分類篩選、客戶生命週期、市場推廣自動化，從而進行精準的數碼市場推廣。

1. 統一客戶資料數據

建立一個集中的客戶數據庫，是市場推廣技術組合的一個基本要素。很多品牌仍面對將不同系統的數據點連接起來的挑戰。只有將數據整合以提供有意義的訊息，客戶關係管理經理才能對客戶過去的活動、行為或喜好有全面的理解，使往後的互動變得更具針對性及個人化。事實上，要在一個單一環境下將客戶關係管理、交易、行為及社交媒體數據結合，需要強大的技術支援及不同系統的整合，以應付市場對客戶洞悉的需求。

2. 分類篩選

要應付瞬息萬變的數碼消費者，必須擁有一個強大的過濾器，以連接統一的客戶數據，及根據跨數據分析來建立智能客戶分類。根據特定要求制定不同的過濾條件，便可進行靈活的分類以配合相應的市場推廣活動。



3. 客戶生命週期

將客戶分類應用到生命週期過程，有助於設計出合適的客戶關係管理營銷活動，從而有效地鎖定目標客戶。在「客戶關係管理營銷自動化成功的四大基本要素」圖中，我們示範如何將靈活的客戶分類結合 XGATE 5As 客戶生命週期模式。客戶生命週期的各個階段採用不同的市場推廣自動化程式或方式，藉此將鎖定目標從潛在客戶變成消費客戶及品牌宣傳者。

4. 市場推廣自動化

在推出市場推廣活動前，上載客戶關係管理數據至電郵營銷平台的循環操作清單等工作看似簡單，但對一些企業來說可能別具挑戰。這些企業對於尋找更好方式來增加向潛在客戶/客戶進行銷售/向上銷售的機會、運行跨渠道程式、及根據行為及即時活動表現追蹤製作個人化宣傳訊息的需要愈來愈大。為應付這些複雜的挑戰，企業轉向市場推廣自動化以簡化工作流程，並提升團隊的工作效率。憑藉市場推廣自動化，可以根據時間、要求及活動觸發點輕鬆設計多渠道營銷活動。透過在適當的時間向適當的人推行數碼市場推廣活動，可提升宣傳活動的反應速度，從而提供更好的客戶體驗及提高業務盈利。

結合市場推廣自動化與客戶關係管理的好處多不勝數。根據一項有關 XGATE 客戶的調查，採用市場推廣自動化的原因包括客戶關係管理質素提升、能夠製作具針對性的信息、更有效追蹤收入、以及更佳的電子郵件和營銷活動管理。透過市場推廣自動化掌握客戶關係管理之道將有助提高效率，吸引潛在客戶參與銷售及向上/跨銷售活動，並提升客戶忠誠度。一旦採用市場推廣自動化系統，並結合客戶關係管理平台，不但可測量成效，亦能洞悉如何吸引潛在客戶及客戶。市場推廣活動的成效將不斷提升，並逐漸成為數碼策略發展的基礎，而業務洞悉將為策略執行提供明確的方向。

科技改變數碼市場推廣只是剛剛開始。未來兩年，客戶關係管理營銷自動化將成為推動亞洲數碼業務增長的關鍵。平台功能結合、競爭力提升、有效的模式將顯著提高轉換率，並能提升客戶體驗及可測量的投資回報率，最終展示出客戶關係管理營銷自動化的價值。

campaign performances in real-time. To tackle these complex challenges, companies turn to marketing automation to simplify their workflows and make their teams more effective.

With marketing automation, you can easily design multichannel campaigns with time, rules and events-based triggers. By targeting your digital campaigns at the right person, at the right time, you improve campaign response rates, thereby leading to better customer experiences and business profitability.

The benefits of using marketing automation with CRM are numerous. In a survey among XGATE clients, reasons for adopting marketing automation included improved customer management, targeted messages, improved revenue tracking, as well as better email and campaign management.

Mastering the practice of CRM through marketing automation will enhance efficiencies and help accelerate leads to sales, up/cross-

sell activities and improve customer loyalty. Ultimately, once marketing automation systems are implemented and integrated into CRM platforms, you can expect measurable results and valuable marketing insights on how to engage, with leads and customers to follow.

Over time, the progressive results of your campaigns will form the foundation of your digital strategy development, while the business insights provide clear direction for your tactical executions.

Today, we are only seeing the beginning of how technology is transforming digital marketing. In the next two years, the adoption of CRM marketing automation will be pivotal in driving digital business growth in Asia.

The combination of platform capabilities, improved competence and proven methodology will bring visible conversion results, followed by enhanced customer experience and measurable ROI. Ultimately, leading to the financial valuation for the CRM marketing automation segment.

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We'd love to show you what XGATE can do for your digital marketing business. Contact us and we'll be in touch for a free, no obligation demo.

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