



mixpanel

# Data & the Modern CMO

Stories of marketing leaders building insights-driven customer experiences—and the data they use to do it.



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# Linda Boff

CMO of General Electric

Back when Linda Boff ran Global Digital Marketing at GE, she spent three weeks visiting companies around the world to try and learn what makes a customer-first organization tick. What she found surprised her. “By and large, the companies that consistently delivered great customer experiences were actually putting their employees first, and, in doing so, they empowered their employees to act in the best interests of customers.”

The best-in-class organizations she spoke to gave employees the resources and freedom to make in-the-moment judgments about what each customer needed, rather than issuing a universal set of procedures and policies. “We visited leaders in hospitality. One of them, a veteran of the industry, gave employees allowances of \$2,000 to delight customers at will. The other, an up-and-comer trying to transform the hospitality space, set up employees to see customer feedback in real time.” Even with wildly different brands and target customers, both saw employee autonomy as an important ingredient for serving customer needs at scale.

Inspired by what she observed, Linda brought the case studies back to GE where she sparked a larger conversation about developing talent who could grow and evolve the brand through the digital age. Now, as CMO and Chief Learning Officer of GE, Linda has fostered her own spin on the “employee-first is customer-first” thesis by helping her teams develop a deep appreciation of and

comfort with data. Here are her three key lessons.

## **01 - Be idea-led and data-informed**

GE has been a data-centric organization for a while, and it’s inculcated that approach in all of its employees. “As a company that helped popularized Six Sigma, we recognize that data makes it possible for us to keep the brand accessible and interesting. Right now, data allows us not only to target leaders and influencers but also see how they engage with GE.” Data tells Linda and her marketing team whether their campaign’s message resonates with their target audience, and if not, gives them a chance to pivot.

But Linda believes data is only as useful as the ideas it informs. Nowhere is this more clear than in higher level brand campaigns. Measuring the impact of brand initiatives can be trickier than more bottom-of-funnel activities, so Linda has built a team that can practice

patience and live in the gray area.

It can sometimes take multiple quarters or even a year to see the full impact of a new, risky awareness campaign. But the payoff is massive. Campaigns like Connect Volcano earned Linda the 2017 Grand Brand Genius Award and helped cement GE's brand as a digital industrial company. "On the brand side, I believe in being idea-led and data-informed. I don't think it's effective to try and drive consensus around an idea by looking at data alone. That's why everyone on the team really needs to have a gut sense for the brand and the vision, so they can put something fresh and innovative out in the world. Then, the team can always fine-tune it based on the reaction because, in the digital world, that reaction is inherently measurable."

By ensuring that employees both live and breathe the brand and know how to use data, Linda finds that the customer ultimately gets the best outcome--and the team

is satisfied that their work has an impact.

## **02 - Bring outside perspectives in for better feedback loops**

Living and breathing the brand doesn't mean everyone on the team has to be a GE lifer. In fact, when it comes to building her team, Linda likes to have a mix of marketers—some who have developed this gut instinct from many years at the company, and others who are new to the brand and can offer a fresh perspective on the market. "I have a team of terrifically talented people, and many of them came from outside of the GE. It's really important, especially for technology companies, to hire people that can adopt a market-first mindset rather than rely on the product-first thinking."

From Linda's perspective, companies trying to solve technological gaps often focus exclusively on trying to improve their product without really understanding what

different markets want and how to offer the product in a way that makes sense for each market.

As a customer-first B2B company, GE's market-first thinking also means focusing on the markets where their customers sell their products. "We really do believe customers determine our success. That has to come with a certain level of respect for what they are trying to do with their business. We have to start with what will make our customers successful in their marketplace—not just how we can become successful in our marketplace."

All of this talk about using data to understand customers and personalize their experiences, of course, leads people, and marketers in particular, to an uncomfortable issue: where's the line between being customer-centric and being creepy? As Marketing increases its use of customer data to target and customize campaigns for diverse markets, Linda believes that employee judgment around ethics and privacy is more

important than ever. "Data without judgment is dangerous. Given the amount of information we have available to us, marketers have to be really careful that we use it in a way that benefits our audience, or else risk that our messages feel intrusive."

Linda thinks about this a lot and has made integrity a key component of her employee-first approach. "There is an explicit company-wide commitment to the ethical use of data. As Pollyanna-ish as it sounds, having integrity as an underlying principle of our brand helps us make better decisions. At GE, it's part of our spirit and letter. On the marketing team, that guides us to use data and insights to give people something that will actually benefit them, rather than what will solely benefit us."

### **03 - Demand integrity but make it easy**

It's not enough to just demand integrity, though—GE has had to create an environment where goals are aligned

to that ideal, which often means resisting the urge to measure everything. Part of that requires sitting down to decide in advance what data is absolutely necessary to the business and what isn't.

“It might sound pablum, but I think marketers and leadership have to remember that not all KPIs truly matter to the business strategy. At GE, we have to get crystal-clear about what data and what tools will enable us to execute on our plan. Then, once we figure out what we want to measure, we have to find the very, very best data people—I call them data entrepreneurs—who can figure out the best way to go about measuring it.” With only this select set of metrics visible to marketers, ethical data use becomes second-nature.

According to Linda, access to the right data, combined with a culture of integrity and market-first instincts, allows her team to understand and act on the business needs of its customers. This combination is GE's secret sauce,

and what makes it possible for the brand to resist the corporate inertia that has led many of its peers to fade into irrelevance. It's also why GE continues to invest in its people. “It is and will always be a priority for the company to develop resilient leaders who can step into their customers' shoes. It means that the CMO can't be the one to start the conversation, but they do have to stretch outside of the Marketing silo and become a torchbearer across the enterprise.”

# Alexandra Weiss

SVP of Marketing at Glossier

For decades, top brands marketed makeup and skincare products as solutions to problems (acne, aging, dull skin, sparse lashes). But now, Big Beauty has the problem: younger generations aren't buying it.

Enter Glossier, the direct-to-consumer beauty brand "focused on making products inspired by the people who use them." In Glossier, 'Glossy girls' (and boys) who have finally found a beauty brand that doesn't want to change





them, but rather, wants to be changed by them.

“At Glossier, our customers are our true north.” That’s Alexandra Weiss, who has led Glossier’s marketing department from its inception. Like most marketing leaders, Ali holds her team accountable to acquisition and growth, but she doesn’t view those metrics as the end of the line. Instead, she uses them to gauge the impact of Marketing’s contributions to Glossier’s founding goal: to build the beauty brand of their customers’ dreams.

“We really listen carefully to our customer because, when we actually include her input it in the product process, she truly becomes a stakeholder in the brand. And if she feels ownership over the brand, then she is much more likely to share it with her family and friends. Our business is ultimately selling products, but we see those products not only as revenue generators but also as conduits for conversation—conversation that makes it possible for our customers to be true stakeholders in our

brand.”

This approach has struck a chord with younger generations. With a team of less than fifty, Glossier tripled its annual revenue between 2016 and 2017 and drew in a cult following of more than a million on Instagram. To marketers who want to reduce the amount of clicks to “Add to Cart,” Glossier’s longer purchasing journey, which typically involves content and peer-to-peer advocacy before purchase, may seem counterintuitive. But for Ali, it’s about building positive word-of-mouth and a lasting relationship with a brand—not just one single product. Retailers that want to emulate Glossier’s fandom would do well to listen how Ali gets a conversation started—and keeps it going—even when there’s a lot of noise in the room.

## **01 - Let customers do the talking**

At first blush, “conversation” might sound like squishy

marketing jargon. But Ali can quantify the effect it has for the business by tracking conversions from Glossier Reps, among other programs. Glossier Reps targets highly engaged customers and invites them to create their own custom landing pages on Glossier.com. On their individual pages, reps can showcase their favorite products and upload videos of their unique beauty routines.

Glossier found one of their first reps, Noor, after she tagged Glossier's account in a photo of one of Glossier's early products, Balm Dotcom, back in 2014. "Noor's relationship with our brand has evolved over the years. She went from a proud owner of Balm Dotcom to one of our top referrers. She has since placed over thirty orders of Glossier and has maintained a net promoter score of 100%."

Not surprisingly, Noor happily accepted Glossier's offer to become a brand rep, and with the help of the team, created a landing page on Glossier.com, where she still

shares her beauty tips and product recommendations. In Noor's page, new customers find a person they could relate to, and, as a result, advice they can trust.

"The Rep pages ended up being extremely shareable and highly successful at bringing in new customers. For us, this kind of personalization is less about maximizing profits, and more about identifying the people that have engaged with our brand and understanding what they like and don't like. Then, we can invite them to make their own story a part of the what we're building at Glossier."

Personalization, advocacy—whatever it is, this bottom-up approach has succeeded. Noor's landing page brings in twenty new customers a month, and she is only one of hundreds of reps. The power of the program is in its potential for exponential growth. As the number of reps grows, so does the number of new users that can find inspiration and discover their new favorite products. Maybe one day, they create a page of their own, and the

virtuous cycle continues.

As an online brand, Glossier is constantly searching for—and building—these kind of networks. Occasionally, an opportunity to promote Glossier will arise that does not allow the team to connect with the customers the campaign brings in. Ali gives the example of Glossier’s partnership between Glossier and retail giant Colette in France, a country where Glossier doesn’t currently ship its products. Though the partnership was a valuable opportunity to make a splash in a new marketer, something was missing.

“Even though we saw lines out the door and sold many more products than predicted, we didn’t know who any of those buyers are, what they thought of the product, or if they would ever buy from us again. We can’t engage them the way we engage customers like Noor. With that distribution decision, we sacrificed our direct-to-consumer relationship.”

While in some ways, the Colette was a strong brand move, in truth, Glossier’s partnership with its own customers is always the best play, giving its fans a voice to spread the good word about products they love.

## **02 - Discretion matters just as much as data**

As much as they would like to, the Glossier team can’t always host dinners to get to know their customers—especially when they need to understand them at scale. To fill the gap, Glossier uses data to monitor and identify patterns in brand sentiment.

“Since I started at Glossier three years ago, we can now understand, at a more accurate and predictable level, why someone might choose a certain product, or what leads someone to become a repeat customer. That way, we can give our customers the best possible experience based on how they’re going to engage with us within a given day, week, or month.”

Often, that requires Ali's team to ask a mix of both quantitative and qualitative questions. "Our marketing insights team is positioned to act as a 'neutral contributor' to our team and ask questions of the data for us. What I really value about the individuals on that team is that they not only can deliver the answer to, let's say, how many orders contain a particular product or how many repeat customers came back in a week, they can pull the instinctual answers also, around why that might be."

Ali is very careful not to over-index on quantitative data when it comes to major campaigns, however. Without this level of discretion, data could misguide her team. "It's important to understand up front how much weight to give data based on the context or the objectives that the team has set for a project."

Social media is one context where Glossier leans heavily into data. On the company's Instagram, a typical post commands anywhere from 30,000 to 80,000 likes.

"We look toward our social media data as an indicator of what customers feel or think about a product or campaign." But there are exceptions. On the occasion of a new liquid exfoliator product, Glossier uploaded a series of Before/After pictures to its Instagram, which didn't perform as well as anticipated. In fact, these posts were some of Glossier's lowest-performing to date.

"Had we used only that particular data point without any instinct in designing the campaign, we would've designed the campaign a different way. But that was an instance where we couldn't just look at the social media data. We had to think about the context it was in." Instagram followers don't cheerlead Before/After close-ups of skin the way they cheerlead beautifully curated product shots. Understanding that social media data might be skewed here, Ali was able to turn down the volume on that input.

Ali has played a key role in helping everyone at

Glossier see where data fits in for different campaigns and channels by making her objectives clearly visible to the rest of the company. When building a brand that keeps customers guessing, the metric that matters on one product launch could be irrelevant for the next.

### **03 - Don't shy away from big bets**

Last September, Glossier launched their Body Hero products line, and, along with it, a campaign that deviated far from the typical launch. Ali's team saw it as an opportunity to make an uncharacteristically bold statement about the brand, and, as such, Ali deemphasized the top line metrics, such as initial product sales, that would traditionally be used to gauge the success of a launch. Instead, she focused on its potential impact on long-term brand awareness.

“From the beginning we knew we wanted to leverage this launch for a major brand moment, which is why we

put images of completely nude ‘non-models’ on billboards in two tastemaking cities, New York and Los Angeles. We wanted to spark a conversation that challenged the pervasive idea that women can only be naked in a sexual way. So we made a conscious choice to make this about our brand—not about selling units of the shower oil and the body cream.”

Even before the launch, the marketing team at Glossier knew that “major brand moments” generate far less revenue in the near-term than standard product launches. But they also knew that their loyal fanbase was built on conversation starters like this, and not safe bets.

“Every campaign has to be different, because in the instances where we've tried to replicate past successes, they have fallen flat. If we don't give our customers something that feels new and fresh, they won't talk about it. There's never going to be one approach that will consistently deliver results. My job is managing that

expectation with my team as well as with executives and investors.”

When investors see that Glossier’s aim is to build an enduring brand—and not just a beautiful quarterly report, it frees Ali from the traditional marketing model of proving ROI in a short window. Then, her team can take a risk like the Body Hero launch when her instinct says it will energize the community and bring more people into the fold.

“To find out if we made the right bet, we always go back to what our customers say. Often, our customers tell us what the brand makes them feel: It makes them feel like they can make good choices or it makes them feel empowered. If a campaign reaffirms that feeling, then we can confidently move forward.”

## 04 - Play the really long game

Building carefully curated experiences based on customer feedback—rather than just replicating past successes—comes with some risk. After all, by asking customers for input and feedback, Glossier has handed over some of its power over the product to their community and then asked for its blessing.

This approach might be out of the question for e-commerce marketers who are judged on their ability to push out inventory quickly. To Ali, that’s a cultural problem begging for disruption. She thinks companies would do well to stop obsessing over short-term ROI, especially given the potential upside of nurturing a community and taking riskier brand bets.

“I’ve watched managers, friends, mentors, and leaders of other companies make quick decisions in order to grow fast. But I’ve never stopped believing in “sleeping on it” and giving decisions the careful consideration they

deserve. I really think people are more successful when they take time to think a problem through, instead of just reacting to it.”

Ali’s commitment to sleeping on it highlights a meaningful distinction between Glossier and Big Beauty. On its online channels, Big Beauty has replicated its in-store methodology of rushing customers to a physical product and then pushing them to buy it. Glossier, on the other hand, favors a protracted buyer journey where customers engage with images, social posts, and reviews long before they make a decision.

Many big retailers might scoff at this courtship, but the writing’s on the wall. In the time since it stocked Glossier products last year, the French retailer Colette has closed its doors forever. Less than three years ago, Forbes deemed Colette the “trendiest store in the world.” Where others might see nothing but irony, the title actually reveals something prescient: Trends are on the out, for

the same reason legacy beauty companies are struggling: because they both tell people what beauty looks like, rather than asking what it means for their customers.

Now more than ever, customers want to form relationships with the brands they buy from and the products they love. That’s why, for Ali’s team, conversations between customers and between customers and the brand aren’t auxiliary. They’re crucial steps in the customer journey. “Given the technology and information available to the consumer, consumers care less and less about what brands have to say to the masses. They care about other consumers have to say. That’s why we want our customers to help co-create Glossier with us. At the end of the day, it’s their opinion that really matters—not ours.”



# Corinne Sklar

CMO of Bluewolf

As CMO of Bluewolf, it's Corinne's Sklar responsibility not only to articulate the company's vision—innovation through strategic customer focus—but also help Bluewolf's clients with the real hard work of turning a strategic customer focus into practice.

In this sense, Corinne is both executive and executive advisor. Like most CMOs, it is her job to use customer data to give her clients better experiences. Unlike most



CMOs, it is also her job to help executives at other companies do for their customers what Corinne does for hers.

After observing hundreds of mid-market and enterprise companies try to define and implement a customer-first strategy, and implementing one for Bluewolf, Corinne has developed a keen sense for what differentiates the haves from the have-nots. The common thread between the companies that she has seen succeed is clear: “They have C-level alignment, top-down support, and cross-departmental resources dedicated to their customer initiatives.”

To be clear, when Corinne says alignment she does not mean approval—she means commitment. That commitment goes beyond just the marketing team having access to data they need to improve customer experience. Executives outside of Marketing have to be able to see the broader vision for the initiative, and then spend the

budget, divvy up the headcount, agree on outcomes, and then decide how to measure them, together.

In her twelve years at Bluewolf, Corinne has seen few marketing departments single-handedly design and implement a program that, by its mere existence, transformed the way the rest of the company did business. Customer-first practices do not spread like wildfires. As is true with most good ideas, they need good marketing to gain traction, so the first job of any customer champion, then, is to create more champions.

“The CMO is brave to carry this flag, as most marketers tend to be when it comes to pioneering new programs. But no matter how industrious the advocates are, they can’t move forward a large customer experience initiative without buy-in from other leaders. That doesn’t mean that the CMO can’t be the one to start the conversation, but they do have to stretch outside of the Marketing silo and become a torchbearer across the enterprise.”

In this exclusive interview, Corinne shares observations from years as a CMO and twelve years advising them, and makes her recommendations to executives who find themselves up against the organizational and cultural barriers standing between having a customer strategy and actualizing one.

## **01 - The limits and purpose of technology in customer experience initiatives**

From Corinne's perspective, the first step a CMO needs to take in order to use data to improve customer experience, surprisingly, has very little to do with data governance, tooling, accessibility, or tech stacks.

As the customer experience strategy, goals, constraints to budgets, and technical resources shift, so too do expectations around what data should be collected, how and when it should be used, and who needs to access it. So time spent debating the 'right' technology up front—

before there is alignment on these expectations—ends up wasting time and dollars.

And it's not only a matter of when. Corinne has also seen too many leaders overestimate what technology can actually accomplish when it comes to improving customer experience. "Right now, technology is amazing, and, inarguably, organizations must be technology-driven to compete in the market. But too many people treat technology like a band-aid to solve much larger problems. The problem is that people use technology. And systems have to feed into that technology, and behind those systems are politics and budgets and security issues and silos—all built by people."

Moreover, the sheer volume of data that companies can collect and the metrics they can choose to measure is overwhelming. "Manual data entry and ongoing data management takes focus and investment. Not all data is important, not all metrics are worth measuring, and with

new regulation like GDPR, this is a perfect time to focus on the right data and management.”

Everyone is chasing the best data stack, but, from Corinne’s perspective, “the most important item to agree on is standard metrics and build personal, organizational, and company-wide benchmarks. If the executive staff don’t have alignment, leadership, purpose, and governance structure to supporting and driving these goals, the data, on its own, won’t be valuable. And I think that is the most important thing we have to we all have to realize: customer experience is not about data experience. It’s about how individuals experience the brand from both inside and the outside of the company. Of course, data can help people make that experience better, but ultimately it is a tool that can only supplement strong leadership and a culture of putting the customer first.”

## **02 - How to break down silos to secure lasting commitments**

Corinne has seen too many organizations trying to build that customer-first culture in a vacuum. “People often talk about customer experience exclusively as it relates to the programs, services, or product that their specific team owns. They’re actually only seeing a portion of the customer journey, because when you actually look at most companies’ customer journeys, and see that infinity loop around acquisition, new purchase, and loyalty, it becomes clear that touchpoints exist within every single department. Not just in marketing channels like email or website or ads, but in the call center, in the purchasing department, in the product, etc. And so, when leaders of each of those departments can map out that journey together and start to understand where pain points and opportunities to add value overlap, the silos begin to break down.”

Because customer experience is, a cross-department issue, Corinne doesn't think it matters the title of the executive that makes the initial push. "It could be CMO or the CIO or the Chief Customer Officer or the Chief Digital Officer. At B2B companies, we're sometimes brought in by the Chief Sales Officer. The politics really depend on whether the company is mid-market or a Fortune 50, and whether the company is going through a digital transformation or if technology is already very core to their business. So the specific challenges will be different but, ultimately, the role of the champion is not important. What's important is that the champion can clearly articulate, up front, why they want to push forward a customer-first initiative, what impact it will have, and all possible ways to measure that impact."

### **Decide on desired outcomes and how to measure them, together.**

The onus often falls on one executive—often the CMO—

to make the company more responsive to the needs of the customers. But the CMOs don't dictate the company strategy, or even customer strategy, so they need to make their case for a new customer experience initiative very relevant to the rest of the executives.

Merely presenting on the initiative does not instill a sense of personal investment or responsibility needed to get others executives to get involved. So the champion needs to get them to participate in a conversation, or, ideally, a vigorous debate, about customers needs and the best way for the customer to deliver on them.

### **Don't settle for nods—nail down commitments**

After working at Bluewolf for over a decade, helping clients go through this alignment process, Corinne has become very good at sniffing out meaningful commitments from cursory ones.

Again, true executive alignment is not borne of an hour-long meeting where senior leadership sits in a room together nodding along to the CMO's vision of a customer-first company. In fact, Corinne thinks CMOs will be worse off if they mistake this kind of tacit compliance for genuine support.

“The biggest risk is that the executive champion will walk out of the meeting with the illusion of alignment.” It not only dooms any initiative from the start and forces the champion to invest time and resources into something that will never get off the ground.

Real executive alignment looks like this: “Other department leaders help decide on goals, the milestones and metrics they will use to measure their success on the goals, and then they to put their money down, make their time available, and dedicate a headcount to hit the goals.”

### **03 - Starting small with a start-up mentality**

Once the champion has secured meaningful commitments from other leaders, the executive staff has to decide on their initial area of focus. Corinne warns of two common pitfalls in this process: “biting off more than you can chew or choosing an initiative that doesn't align with the business value you offer to your customers.”

Together, the executive staff needs to revisit to that customer journey that they mapped out and assess the different pain points. “Start with one that is going to be the simplest and cheapest to address, that will drive the most business value in the shortest amount of time.” And don't rush it. “Where you start with a customer experience is everything.”

Solving a simple, but not insignificant, problem early on generates excitement about the broader customer experience initiative, which will help carry the company

through more difficult challenges that inevitably lie ahead. “It might be in the call center. It might be at the bottom of the acquisition funnel. We never know going in, but that’s the important work of all those alignment sessions—to help the executive staff seed that out for their own company.”

Once the initial area of improvement is decided on by the executive staff, the champion needs to invest in internal change management. “This is where CMOs have an edge, because successful organizational change is all about communication and internal marketing. If you have a quick win, you should tell that story internally to demonstrate that the customer experience initiative is paying off. Applying the same rigor to your internal marketing of the initiative as you would to an external campaign can continually drive buy-in, budget support, and ongoing governance for the program.”

Particularly at enterprise companies, organizational structure determines how successful companies are at

maintaining support for customer experience initiatives in the long-term.

“When it comes to driving customer experience initiatives, larger businesses, in particular, need to make sure they are structured in a very agile, efficient way that is conducive to a start-up mentality.”

Structuring customer experience strategy around an ‘innovation lab’ model can help enterprise companies not only maintain an initiative, but also ensure that they are always able to identify those high-impact areas for change.

“We work with one of the largest oil and gas companies in the world, and they run their customer experience strategy with a center of innovation—a group of individuals who test, in a very agile way, the areas where there is room to improve customer experience. It’s all hypothesis driven and based on 30, 60-day sprints. They come up with a concept, they test the concept with this

small group of customers, and then they decide whether it's worthwhile to turn it into a new program. And they're testing 20 of these ideas at any given time.”

Continuous innovation is necessary to keep up with the evolving needs and expectations of a diverse and growing customer base. Even though Corinne encourages to have a long-term vision—and even write up a multi-year roadmap—for customer experience, not every program need to be, or even should be, implemented.

“The executive staff can take the learnings from the new experiments and use it to tweak the vision accordingly. It's more important that everyone is aligned around the same North Star and less important how you get there.”

# Zach Beatty

VP of Marketing of Aaptiv

The fitness industry has a customer loyalty problem. New Year's Day is an object lesson to this effect. New members storm gyms by the busload, and less than two weeks later, the scene is a ghost town. Little, it seems, can be done to retain them.

Zach Beatty doesn't blame customers' intrinsic motivation. As the VP of Marketing at Aaptiv, a leading provider of premium digital health and wellness content,





Zach has surveyed the wreckage of an industry rife with products and services that have made promises they can't keep.

“The fitness industry hasn't always helped consumers develop a true understanding of the time, programs and habits necessary to reach their health goals. We've all seen ads for quick fixes in the form of nutritional or supplement packages, gadgets, and training programs that promise unrealistic results in a short time and little effort. If consumers define their success based on these expectations, they are likely to get discouraged and give up. That's why at Aaptiv we strive to help our members develop the habits, routines and confidence necessary to live a healthier life. From what I've seen within the Aaptiv community, many of our members are accomplishing more than they ever thought they could.”

Aaptiv offers its customers exactly that—routine, encouragement, and support—in the form of over 2,500

audio-based workouts designed to push people beyond their limits with trainer-led classes across every type of exercise and a wide variety of activities, including running, strength-training, yoga, indoor cycling, meditation, and more. So in an industry full of businesses relying on fads to keep them afloat, Aaptiv stands out.

The idea that dollars cannot replace discipline has not only shaped Aaptiv's product, but how they market it, too. Despite what many of us have read in viral stories about growth hacking, Zach's cross-functional team knows that a loyal customer base will not appear overnight, especially not in the health and wellness space.

Both Aaptiv and its members succeed, in part, because they've given up their addiction to quick fixes, and recognized that nothing can replace hard work. Aaptiv members know that meal-replacement shakes can support an active lifestyle, but not substitute for one. Similarly, Zach knows that growth marketing tactics can supplement

a customer strategy, but they cannot be the strategy—not if he wants customers to stick around.

In our interview with Zach, he tells us how Aaptiv’s cross-functional team of marketers, data scientists, product experts, and in-house trainers have turned their quest for acquiring customers into a commitment to creating advocates—the kind who not only use Aaptiv regularly and encourage others to do the same, but also leave reviews like this one:

“This app will make you look forward to working out. You’ll be hooked and your workouts will never be the same. You’ll want to tell everyone about Aaptiv!”

## **01 - Filling out the funnel**

Aaptiv’s ability to generate a review like this not only speaks to the quality of Aaptiv’s product but also to their investment in customer engagement. Because Mike, the

member quoted above, not only thinks other people will love Aaptiv as much as he does, but will also want to share that love as much as he does.

To some marketers, Zach team’s prioritization of customer engagement right alongside acquisition might sound surprising, but more and more, Marketing is taking responsibility not just for the customers it finds but also the quality of those customers and their lifetime value.

“Some marketing teams don’t give much thought to what customers do after conversion. They don’t ask, ‘What’s the downstream impact?’ At Aaptiv, the marketing team pays close attention to the full funnel. Our focus on engagement metrics serves a number of purposes- it ensures we are doing the right thing for our customers, which in turn impacts our bottom line, and it also informs how we develop future acquisition programs.”

At Aaptiv, personalization is all about the all the

member touchpoints starting with discovery, when Marketing needs to show the value that they offered a customer during the acquisition phase. “A member’s experience doesn’t start just when they “convert”—it starts when they first learn about and interact with Aaptiv. So one of the things that I think is extremely important is to not only clearly convey what the member is going to get, but then follow through on those expectations when the member clicks through from an ad or promotion. Once someone signs up, it’s really up to us to help guide them, because we have over 2,500 workouts in the app.”

In the age of personalization, Zach believes in getting granular. Delivering the right workout content to a certain member or audience shows them that the story is contiguous—that what they clicked on is what they’ll receive in the app. If Zach can’t make good on whatever niche workout the member came to Aaptiv expecting, he wasted dollars acquiring them—to say nothing of their time. But Zach and his team certainly can’t handpick the

perfect workout for each of Aaptiv’s 200,000 members themselves, so they do it with data.

“One of the outcomes of looking at our member’s engagement trends was realizing that some new members might not know where to begin.” It’s understandable. Aaptiv offers what some might, at first, experience as an overwhelming amount of variety: tons of unique programs and classes, all searchable by type of activity, level of difficulty, trainer, and music taste.

“We took this observation and built a “recommended for you” section that helps our members, especially new ones, find programs and workouts that align with their goals, preferences, and abilities. The latest update has these suggestions that will evolve over time. It’s essential that we get in the habit of using the feedback from our members and the metadata about the classes to deliver them the best experience possible. When we think about building personalization into the product, we have to take

a look at the feedback and data and ask what makes a workout good versus great. Is it the trainer? The music? The difficulty? Which elements are consistently rated highly by that member or member group, and which do they not like as much? That way, next time they open Aaptiv, we can recommend a workout that best fits their training style.”

## 02 - Calling in reinforcements

In order to successfully use member behavior data to build those customized experiences, Zach’s marketing team relies on the expertise of other organizations. “Because our focus is much broader than strict acquisition, we work cross-functionally more than a traditional marketing organization would.”

That’s because at Aaptiv, everyone holds themselves accountable to delivering the best possible experience for the member.

“It is a very collaborative environment. We try to avoid building silos where individuals are solely focused on their own goals or KPIs. Instead, we cultivate an environment where marketers work closely with engineers, data scientists, as well as the content and audio team to solve problems and understand what will drive the most value for our members.”

Out of all the teams, the marketing department collectively has the largest stake in acquisition, but Zach’s team works closely with the rest of the company to understand how the acquisition process affects other parts of the funnel.

“For example, we might work with the data science team to help us understand the downstream effect of a new signup flow, or work with the CRM and Brand teams to see which content, email, and push notifications best help members find the right programs. These insights impact how Brand presents different aspects of the

product and how Growth advertises to prospective members. It's a very different approach than simply trying to grow a subscriber base at all costs."

These are the challenges the marketing leader at a subscription-based company faces. Aaptiv isn't selling a product that is meant to be a one-time purchase, where volume sold is the driving factor of success. Aaptiv's business depends in part on new member acquisition, but equally so on convincing existing customers that it's worth sticking around month after month. The product is based on building relationships and earning the trust of their customers, so the marketing must be as well.

### **03 - Prioritizing members, not metrics**

Occasionally, there will be instances when easy wins for acquisition may not drive the intended results in other areas. In an ideal world, the interests of different teams would never clash, but in his career, Zach has seen

campaigns prioritize vanity metrics and impact other aspects of performance.

"Over the years I've seen many marketing teams look no further than one metric: new customer volume. This narrow view ignores the impact a campaign might have beyond conversions. Marketers, particularly those focused on acquisition, need to ask questions about how their campaigns will impact the customer's experience: is the value proposition clear? Could this messaging increase churn rates? Will there be an uptick in returns or support calls? These downstream effects need to be factored into the planning process because they impact the customer's view of the brand, and, eventually, that can affect overall performance."

Zach says that teams also should introduce this critical thinking process as well as post-campaign reflection to inform the selection of the experiments they run, so they can understand what will be best for the customer and

the company in the long run.

For instance, another marketer might prioritize showing members classes that are easy to complete when they first start a trial. After all, Aaptiv knows that completing that first workout is an important behavior in a customer's lifecycle. To force this behavior, some marketers might think to only surface beginner classes. The easier the workout, the higher the completion rates. Higher completion begets more engagement. That's would be one approach some may try.

Zach emphasized the need to dive deeper into the member's first experience: "Prioritizing any engagement over the right types of engagement doesn't necessarily give our members what they are looking for. We have to consider things like completion rates, ratings and preference to ensure we're creating workouts and programs our members really love." It's the kind of mistake that some acquisition marketers fixated on top-of-funnel

activity would march right into. In all likelihood, though, this error could impact member retention over time.

"We need to make sure we're measuring our member's satisfaction with our content in all stages of their journey. Whether they just joined Aaptiv or have been part of our community for years, we need to ensure we're consistently delivering value to our members, because what helps them is also ultimately what helps the company grow as well.

## **04 - Sticking to loyalty**

Customers grow loyal to businesses that make a compelling promise and then fulfill their expectations. Here again, the fitness industry functions as a helpful object lesson: Everyone knows someone who has abandoned a resolution, but many also know someone who's signed up for a gym or training program and steadily grown into an evangelist, unable to quit. (CrossFit folks,

we're looking at you.)

It's easy to acquire the first kind of customer. Businesses that cast a wide enough net will catch many. But when those customers walk away, all that hard work will add up to a grand total of the first and last month membership fees and a vague recollection of having tried (and failed) that program that one time.

Acquisition dollars are better spent on the kind of customer that Aaptiv has built its marketing around—the one who stays active, engaged, curious, and vocal, regularly relaying feedback about why they keep coming back and sharing their love of Aaptiv with others. Their lifetime value is often worth more than a hundred of the ubiquitous acquire-to-quit members who come around for a New Year's resolution or a summer body. That's why Zach believes engagement will time and again prove itself the better driver of revenue. Marketing can either be incidental to this change, or—if the team prepares for a journey—instrumental in it.



# Jeanniey Mullen

CMO of Mercer

If we imagine an enterprise company as a government, Marketing—the company’s representative on the global stage—would be the Department of State and the CMO, the Secretary. As Mercer’s Global Chief Marketing Officer, Jeanniey Mullen’s role as the number one diplomat involves using soft power to get both internal and external stakeholders on board with Marketing’s mission.



Jeanniey doesn't shy away from using political language to describe her role. "I see myself as an ambassador for change both within the Marketing organization and at the executive level." It is, in some ways, the challenge Jeanniey has been training for her whole life. After all, for marketers as for diplomats, storytelling and persuasion are the name of the game. The challenge takes on a new dimension when the target audience is internal stakeholders.

By building consensus from the bottom-up, Jeanniey handles bureaucratic diplomacy without having to climb the mountain of conflict. In this exclusive interview, she shares her creative approach to internal communications and how it can support a practice of patience and a culture of trust. At Mercer, it starts with Marketing. When done right, it impacts growth for the entire company.

## **01 - A bottoms-up approach to supporting the entire business**

A few months into her role at Mercer, the world's largest human resources consulting firm, Jeanniey realized her marketing department needed, well, better marketing. "About three months after I took this role, I began assessing the team's organizational structure, its performance and how other leaders within the company viewed our priorities and goals. In the process, I learned that there were very few people outside of marketing that understood what function each group was responsible for and what impact it had on the organization."

To fill the gap in understanding, Jeanniey turned to her team of talented marketers and asked them to put on a virtual career fair. Each one of her business leaders created a three-minute video to describe what their team does and talk about open opportunities. The program targeted people who did not understand the role of

Marketing, but did not feel hostile to it, either.

“We tried to target people that genuinely don’t understand what Marketing does, and, as a result, have never fully embraced it. Once we filled the gap in understanding, they became evangelists who could spread the word and change the minds of the skeptics.”

Jeanniey’s word-of-mouth approach to internal marketing mirrors that of the early-stage startups she led in a past life. “A startup rarely has any vocal brand advocates, and it certainly won’t have a brand ambassador program or case studies or video testimonials—even if their product is incredible. They have to first explain to people why the product is so great in terms those people can understand and relate to. Once they get a few people in the door, those people can share the news with someone else, and create a virtuous cycle of advocacy. At Mercer, that’s the approach we’ve taken to try and help 23,000+ people

see what Marketing can add to the business.”

A dozen or so educational videos seems insufficient to accomplish such a massive goal, but, given the opportunity to come up with their own creative solutions, Jeanniey’s marketing leaders were able to make the program sing. “The head of the Operations team created a video, and it was literally about how, by 2030, we’re going to be doing Marketing from Mars because operational efficiencies will enable us to get there. It was hilarious and, literally, completely out of this world, which gave it punch and made it memorable.”

Though the advertised intent of the career fair was to alert people looking for a new role within Mercer, the true goal was just to engage people from different organizations and bring them into the marketing fold. “In order to work cross-functionally, other parts of the organization need to not just know what we do, but also who we are.”

Marketing, after all, is fundamentally a support organization. Its work is designed to amplify that of other teams. Building relationships with other parts of the organization dictate Marketing's ability to understand what other teams want to accomplish, so they can help them get there.

## 02 - Nimble at scale

Specialization can be the enemy of nimbleness. If people don't have the ability to move outside of their silos, they become hyper-focused on the metrics that apply exclusively to their work—often at the expense of the company's goals. The problem is compounded when people are hired to handle a specific channel or task, and don't have the opportunity to see how people engage with their work once it leaves their desk.

“It is a marketer's job to improve landing page copy or maximize SEO optimization, but if they aren't able to

track the holistic user journey—where a user goes from their landing page or from the search engine—it creates problems for the business. Highly specialized marketers will point to very narrow metrics—‘I was able to increase SEO optimization by 73%’—with no regard for the team's broader goals. It's fine to get in the weeds, but we want to trace the longer term effectiveness of tactics like SEO optimization, too. As in, how does each tactic tie to brand, retention, and revenue?”

To bring key cross-functional metrics to the fore, Jeanniey again uses her startup approach: break down silos and bring all hands on deck. While it's not feasible for marketers to touch every program at a company of Mercer's scale, Jeanniey looks for versatile people who embody that spirit of co-ownership. For her, specialization is less important than inquisitiveness and a collaborative nature.

“Sometimes, it might look like I'm hiring people with

overlapping skills, but I think it's important that someone who leads brand, for example, also know a lot about social. That way, when she designs a brand campaign, she understands how to make it conducive to social channels. Then, when her works gets into the hands of the social team, they can execute effectively and drive the metrics that matter most to both the brand team and the social team. Those are ultimately the metrics that matter to Marketing, and, by extension the business.”

### **03 - The necessity of empathy for every audience**

The diplomacy required for marketing requires Jeanniey to create internal alliances through soft power and building multi-disciplinary teams who can speak each other's data languages. While necessary works, it can sometimes feel a little inauthentic. But Jeanniey knows there's more to it than that.

One of the most famous—and most misunderstood—business books is Dale Carnegie's How to Make Friends and Influence People. It has a reputation as being a Machiavellian schmoozer's guide to getting ahead in the business world, but really it's not that at all. The primary takeaway is something far more radical: the way you get ahead in the business world is by genuinely caring about the people around you. It's an empathetic approach Jeanniey lives by.

“As I've gotten older, I've started to realize that when I go to work, if someone is mean or rude, often times we're quick to judge them as bad people or not worth our time. By being patient and understanding of someone who is in a terrible mood or who says something to you that you wouldn't necessarily appreciate, you might give them hope that whatever negative thing is going on in their life will eventually change.”

That empathy, that effort to understand where people

are actually coming from perhaps even after they've burned the benefit of a doubt, is what Marketing is all about. It's about learning people's true motivations and learning to speak to them, both internally and externally.

# Siddharth Taparia

SVP of Marketing Transformation at SAP

Siddharth Taparia is not afraid of thinking long-term. As the SVP and Head of Marketing Transformation at SAP, he heads up strategic partner marketing and oversees SAP's Marketing strategy & transformation. That means that he has a keen interest in how users interact with SAP offline and online through its website and apps. In his role, there are any number of ways he could approach it. He could try to drive certain user funnels, he could try to increase the number of new users into the site on the presumption



that they'll grow the sales funnel, or he could try to build an ecosystem of content that appeals to a specific and targeted audience.

On some level, he has to do all of those things. But biggest challenge he faces is answering the question: how do we turn customers into customers for life? This question is perhaps notable for what it is not. It's not "How do we reduce churn? Or "How do we increase retention?" As Siddharth says, the big question is "How do we get people to enter into a business relationship with us, a multinational B2B SaaS business, that, forgive the cliché, will stand the test of time?"

These are the kinds of questions that any marketer might have, but they're particularly vital for software subscription businesses. At a multinational B2B SaaS business, "knowing your customer" involves knowing 378,000 customers across 180 countries, which, even for the most extroverted person, seems unreasonable. But it's

something they've managed as a company. It's how they continue to keep customers coming back for more. So how do they do it?

"How do we get people to enter into a business relationship with us, a multinational B2B SaaS business, that, forgive the cliché, will stand the test of time?"

## **01 - Data: the next best thing**

When it comes to getting insights into how users feel about a particular product, Siddharth starts with the obvious method. "Nothing beats talking to a customer live. We do that all the time. Speaking with our customers gives us the chance to see what challenges they are facing. Still, that's only anecdotal evidence, so we supplement it with research. This research tells us who they are and how their habits can help predict what they'll do next."

That all sounds well and good: use data to understand

customers. It's something every marketing organization claims they want to do, but often struggles to execute on. How does SAP pull it off? "We have to make sure that we're not just aggregating data, but slicing it so that it tells us specifically who we are looking at and allows us to interact with them in a way that lets us reach them. Understanding customer personas allows us to target customers and give them customized experiences."

Beyond the obvious benefits of using data to know more about your business and using that knowledge to make smarter decisions, Siddharth also points to one of the lesser-discussed benefits: having a neutral arbiter that ends arguments.

"Basing the conversation on data means arguments aren't decided by the most powerful person's motivated reasoning; they're fact-based. The numbers either make your case or they don't."

## 02 - Retaining customers for life

For a large company like SAP, the benefits of using data are amplified by the timescale they operate on. Unlike smaller competitors who need to worry about surviving the year, SAP can step back and think longer-term. When lifetime value means lifetime value, customer satisfaction is paramount.

"Making a sale is great, but what happens afterwards is equally important. What that means for us is simplifying our organization for the customer, so that when they interact with us, they don't feel like they are being handed off from department to department to department." In other words, no one wants to feel like a hot potato or someone else's problem. Instead, customers expect that the brand on the other side treats them like the human that they are. They accept criticisms. They speak with a human voice and treat them with dignity and respect. They work to get better.



Of course, this concept is easy to agree with but very hard to actually make real. One way to move large organizations like SAP to build long-term relationships is by creating incentives aligned with subscription-based pricing models, which in turn helps teams focus on what happens after the sale. “We are constantly balancing our focus between acquisition and retention. What is the type of training that customers require? What aspects of their experience could be improved? If we can improve those aspects of their experience, will they become champions of the product? And if they do, what will they need from us in order to advocate effectively for the product to a colleague or manager?”

Practically, the focus on retention can shift on how the marketing team views other critical channels and assets for communication. For example, as more and more of the customer journey takes place online, a website and online ecosystem that has what both prospects and customers alike are looking for are essential.

“To an outsider, SAP.com might look like it serves one purpose: to explain our products and solutions to prospects and customers. But people visit our website for a lot of reasons. They might want to ask for customer support, to learn about a new feature, to find out where an SAP event might be happening, or even to find a community of like-minded users and product experts that either has challenges like theirs or can help solve those challenges.”

It’s not enough to have all of these pieces housed together under one domain—the experience for the Fortune 500 or a small/mid-size (SME) customer must be seamless, even if different departments provide the content. “Typically, customer needs are met by different departments. Services are handled by one team, community is handled by another team, and Marketing certainly is. In the past, customers could see through these seams. So as a company, we had to come together and ask ‘How can we make this experience cohesive? How can we ensure that when a customer comes to the

site looking for our community, we can identify whether they are an expert or a beginner?’ We want to expose them to an independent voice, that is not Sales, that is not Marketing, that is not Support, but that is representative of a community, that comes from interacting with your peers.”

### **03 - Unsatisfied employees can't make for satisfied customers**

Siddharth's work requires serving a global customer base, and serving a global customer base requires a wide variety of perspectives and backgrounds. In order to do that, we need to be able to speak our customers' languages, literally and figuratively. Retaining a diverse, global customer base happy requires having a diverse, global workforce. I want everyone to feel like they belong and like they can take pride in what they do at SAP.”

Building a happy, diverse workforce isn't just the right

thing to do, it is a business imperative for companies that want to think creatively and build community with a global customer base.

“A diverse workforce is an innovative workforce. Diversity is not merely an end goal in itself; it's part of a process that allows organizations to think in different ways.”

Fundamentally, that's what drives Siddharth: by building better companies, we can build a better world. “I want to ensure that we create a world for future generations that is better than the one we were given. That means reversing damage to the environment, creating a more equitable society, and building a strong economy. On a day-to-day basis, that means encouraging and mentoring the generation joining the workforce right now, so they can bring their skills and talents and aspirations into the workplace.” In other words, treat every relationship like it's one for life.



# Jeff Samuels

Global VP of Cisco Security Business

New technology has done more than merely test the mettle of marketers; it has transformed the means by which marketers engage. Today, Marketing is a discipline comprised of finite domains of expertise leaving many marketers ill equipped to handle this new era of specialization. As Global Vice President of Marketing for Cisco's multi-billion-dollar Security business, Jeff Samuels

has observed this paradigm shift from its epicenter, Silicon Valley.

According to Jeff, a principle responsibility of a marketer is to act as the voice of the customer. The key benefits of espousing the customer's voice are to design more effective customer conversations while elevating and scaling customer engagements. In today's era of digital transformation where most customer buying decisions are happening both physically and digitally away from the company, marketing is one of the most—if not the most—important priorities for every company.

Most firms attempt to define customer journeys as a way to support their intended go to market activities. Typically, functional organizations that touch customers have specific, and often misaligned, points of view on the best way to engage them. Sales, Services, Customer Success, even Engineering, all design and often deliver experiences to customers with the best of intentions but

also with inherent disconnects.

“Each team often works on a separate point of the customer journey or creates their own unique journey with different moments that matter. When one team's version of the journey is even 2% different from another group's version, the resulting misalignment will have a substantive impact on the customer experience, and by extension, business outcomes. The modern marketing organization is often perfectly positioned to bring that perspective to the broader business.”

By representing the voice of the customer across their full lifecycle, Marketing can help its colleagues be more impactful and function as a true growth partner. Jeff would know. He's navigated these business conversations well. For him, success, in part, comes down to rethinking one of Marketing's oldest friends: data.

Marketers are no strangers to data. However, with an

ever-increasing number of tools and measurable customer touchpoints, it is easy to become overwhelmed by the volume of data, and the new approaches to analysis. To continue advancing a modern go-to-market strategy, and a corresponding set of business outcomes, marketers will need to adopt a nimbler and more refined way of divining meaning from data. And in doing so, they will provide insight into the customer journey for the entire company.

## **01 - Care about tests, not report cards**

Even though marketers were some of the earliest proponents of data, many have lost touch with how to use it effectively. Jeff believes marketers have much to gain if they can resist thinking of data as a simple report card and start using both the available technologies and their shared data as the medium for progress.

“Data originally became the center of marketers’ worlds primarily because it functioned like a report card to

highlight campaign ROI. Although the way companies use data has evolved, many marketers still treat data in a retrospective context. It’s not good for anyone to be waiting and praying for a good report card.”

Instead, Jeff prefers to study the habits and data of consumers across the buying journey. He views the iterative and rapidly paced agile software development model as a guide for marketers. Rather than using data simply to evaluate the success of a campaign, he wants data to help marketers trailblaze new paths to success.

“Test facets of your approach in stages. Have hypotheses. Monitor the data as it changes. Let that be what drives the marketing agenda.”

To leave the world of report cards behind, marketers need to think in terms of where the data will lead them. A hypothesis is important, but on its own, still can result in short-term judgements. In the past, marketing hypotheses took the form of objectives-like statements: We hope

we get 1,000 sign-ups by Friday, for example. Jeff wants these hypotheses to evolve into more action-oriented, detailed, conditional statements.

“A test should have an insight into cause and effect. Otherwise, we’re left saying, ‘80% of customers did this one thing—what an interesting insight.’ The worst thing marketers can do is get the data and then ask, ‘What now?’ If there’s not a clear answer, why did we measure it? That means our hypothesis wasn’t detailed enough.”

If data is to continue sitting at the center of marketers’ worlds, they need to recognize the new realities of data. That means being adaptive and detailed enough to catalyze change, instead of waiting for it to happen.

## **02 - Measure the company, not the marketing**

Traditional metrics, in fact, do matter. That said, a marketer’s business partners—often in Engineering or

Sales—don’t always grasp how marketing KPIs directly impact the overall success of the company. Jeff tasks marketers with educating their peers about how marketing metrics advance understanding about the overall health of the business—and how the metrics directly connect to outcomes that sales, engineering, services and customer success teams care about.

“Conversion rates for interactions online and at every stage of the funnel measurably impact growth. They ultimately translate into pipeline and bookings. And they tie into customer acquisition cost and lifetime value.”

While a marketer can feel safe in the knowledge that their metrics count, they should also adopt a sense of humility about them. “Marketing metrics” should only be part of their world.

“I advise CMOs to focus on company-wide metrics that they can implement as shared measures between marketing and other teams. Why? If business leaders limit

their view to the funnel, without a clear perspective of how that fits into the broader story, they're doing their teams and their business a disservice. The real insights are derived from connecting all the different pieces of data as a way of also clarifying the entire customer journey.”

Jeff especially encourages marketers to invest in the metrics that are most relevant to crafting a holistic portrait of the customer. Typically, these types of metrics mark intersections where different parts of a company engage in the customer's journey. “One good example is Sales-Qualified Leads (SQL). Marketers contribute to that pipeline by acquiring initial inquiries. But there is more to SQL than what marketing delivers. So much of this metric's success hinges on sales validation of prospect interest. By working to understand where the digital world connects with the physical world and improving conversion rates for Sales Qualified Leads, both sales and marketing collaborate more effectively to drive business growth.”

“I advise CMOs to focus on company-wide metrics that they can implement as shared measures between Marketing and other teams.”

### **03 - Embed Marketing throughout the customer journey**

The conversation between customers and companies is richer now than ever before. Prospective customers expect to engage frequently with a brand before making a buying decision. Products are iterated to the tune of customer preference. Support is available 24/7 across several channels. If Marketing wants to “get” the customer, it will need to live throughout the journey, and not just at the top of the funnel.

“There are all of these ‘moments of truth’ now, and Marketing plays an important role in each and every one. From that first introduction to the brand to the free trial to purchase to adoption to renewal, I believe marketers

should start mapping out this unified customer journey and defining what success looks like at each of these touchpoints.”

Successful modern marketers, according to Jeff, are those who can demonstrate a deep knowledge of not only marketing’s best practices but also this unified customer journey. The really good ones—the marketers whose companies will win due to their efforts—are those who can take it one step further, using data nimbly to closely track the right company-wide metrics. It is this adaptive relationship with data that will create the predictive capability to define immediate actions based on the derived insights.

“There may always be misconceptions about Marketing. And some colleagues may not see every aspect of how Marketing drives the business. If this gap in understanding is something, we, as an industry, are going to overcome, we need to demonstrate how Marketing creates optimal

customer experiences. Data underlies our ability to achieve that aim.”



# Danielle Guzman

VP at Mercer

Danielle Guzman understands marketers who fear data. She used to be one. Looking at her resume, though, it's a little hard to believe. Before she joined Mercer, Danielle founded AIG's customer insights program. There, she managed a team whose sole purpose was to mine qualitative and quantitative customer data and provide strategic intelligence to every function of the business. Now, in her role as Global Head of Social Media and



Distributed Content at Mercer, she uses data to maximize the impact of social media campaigns and predict the future of digital content consumption.

Her dramatic turn towards insights-driven marketing would make anyone wonder: How did Danielle get from data-averse to data-first?

Danielle explains how she tackled her fear at its source: “People often fear data because they don’t understand it, and they don’t want to admit they don’t understand it. So I first had to get comfortable with not knowing everything I needed to know about data, and then I had to get comfortable asking questions of people who knew more about it than me.”

Reliance on true experts and an understanding that we can never know everything sits at the very core of Danielle’s belief system. “Given the pace of innovation, there will always be more for marketers to know about

data. If we wait until we know everything to start using data in our day-to-day, we will spend our entire careers waiting.”

As a marketing leader, Danielle seeks to help marketers fill gaps in their understanding of data. She does this by pairing creative marketers with more data savvy ones, so they can learn from each other. “When we work with people whose skills compliment ours, it maximizes our impact. I know marketers who have seen a massive payoff by acting with data, even if they don’t start out with much technical expertise.”

Since diving head first into the world of insights-driven marketing and leadership, Danielle has seen data transform the careers of dozens of marketers—including hers. Here are three positive impacts marketers can expect to see when they take the leap of faith to grow their familiarity and comfort with data.

## 01 - Spark open conversations

The more marketers incorporate data into their day-to-day, the more naturally it fits into their thinking. Danielle encourages marketers to use data to tell a story. This gives people something to talk about, and it opens the door for greater investment in your work.

“Without data, ideas are just opinions. Using data helps us vet ideas by getting to the ‘why’ behind them. As in, ‘Why do we think this campaign will bring in more customers compared to this one?’ or ‘Why do we think this channel will perform better compared to that one?’”

Data also has the power to instill more trust in Marketing within the business. “My team’s ideas are always met with enthusiasm when we put quantitative substance behind the qualitative story we tell about a program. People are even more receptive if we can use metrics that are relevant to them, and their objectives.

So, instead of sharing a channel—or vanity—metric, like the number of impressions we generated, we will point to the attributed social media generated revenue. Everyone understands revenue, and so the entire room perks up.”

## 02 - Make room for creative risks

Marketing has to constantly innovate to stay relevant in a rapidly evolving digital landscape. Danielle’s team at Mercer uses data to inform their actions when trying new things and tweaks their programs as results come in.

“My marketing team focuses on digital channels, and those channels change every single day. There are new algorithms, new platforms, and new ways of using them. To keep up, we must use past performance data to come up with the freshest approach possible and then iterate on it in real time, or else get whiplash from changing trends.”

Danielle gives video as an example of how her team at Mercer resists simply following the herd and leans into creativity to deliver a fresh take. “By 2019, video will drive 80% of all internet traffic, and so there won’t be much of an advantage of video for video’s sake. So our team is trying to understand the ‘why’ behind the video trend. What makes it so powerful? So shareable? That way, we can execute in a unique way that delivers vital insights to our audience.”

To supplement the more qualitative, instinct-based work, Danielle’s team uses data to investigate the past success of different content types and channels. “Data supplements supposition. We look at data to see, for example, the channels where customers are most responsive to a similar content type. That way, we can identify a few leading indicators, break down our approach, and outline why we think it will succeed and where there is uncertainty.”

With analytics in hand marketers can take educated risks. By tracking engagement with a given campaign in real time, for example, all outcomes become invaluable learning opportunities.

“When we launch a program, and the data shows that people are engaging with it and it’s getting us closer to our overall goals, we can start iterating and building out on that success. When the opposite happens, we are prepared to fail fast. We look at the data to see why people didn’t engage with the content or in a particular channel, learn from that, make changes, and then try again.”

Marketers on Danielle’s team understand that, with data, every outcome is an opportunity to learn. It’s an iterative learning process, and with that culture in place, everyone is less likely to make fear-based decisions, which ultimately limit one of their superpowers: creativity.

### 03 - Find greater career fulfillment

Marketers like taking risks—to place big bets on fresh ideas. Indeed, Danielle herself finds greater job satisfaction in environments where she can do so. She sees that fulfillment and purpose can be real difference-makers in a marketer's career, especially for those who are dedicated to their craft. Data makes risk taking, well, make sense.

That's why it's so important for marketers to focus on the 'why' of what they do. To maintain career fulfillment and momentum, Danielle believes marketers need to remain career-empowered. "Having that personal 'why' makes us infinitely more resilient, regardless of the situation."

With data, questions, and creativity marketers have great opportunity to find campaign—and career—success.



# Understand Every User's Journey

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