

"We are now in a digital overload mode. The channels companies relied on to connect with their customers and prospects and the old marketing strategies will not work in this new world."

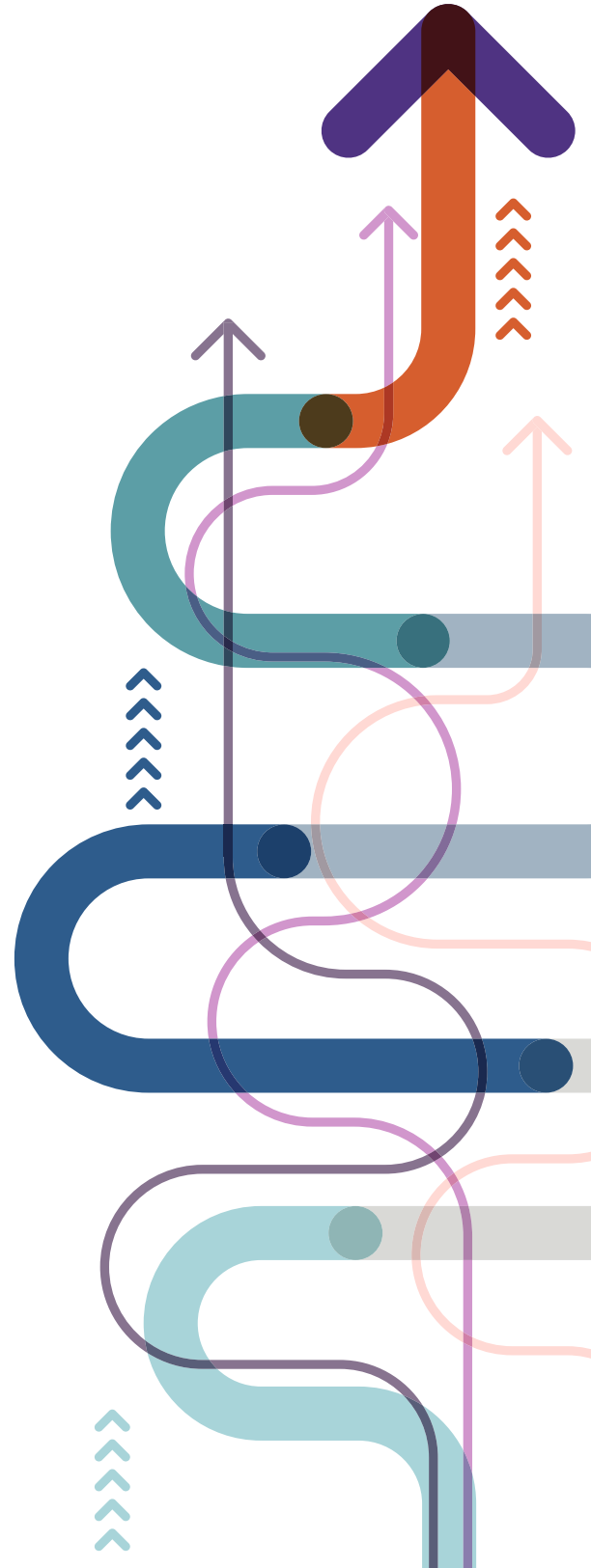
– Yamini Rangan, HubSpot CEO, speaking at INBOUND 22

The Connected Customer Campaign Framework*

A Workbook for How To **Plan, Run** and **Optimize** a Personalized, Orchestrated, Omnichannel Marketing Campaign

***For CEOs, CROs and CMOs only.**

If you're not in one of these roles at a midsize or larger company, this isn't for you. Seriously, we're not kidding – don't use this resource.



WELCOME!

I'm going to share some harsh reality with you. What worked two years ago isn't working today.

It's harder to get your site ranked on Google due to page load speed requirements. Demand generation is harder because so many companies are flooding the platforms with ads. Social media is inundated with bad content and bad actors. Blogs and pillar pages don't rank like they used to. Email is impossible to deliver because of new privacy tools.

I could go on and on.

If you're frustrated and struggling to get marketing results for your company, you're not alone.

At SEG, we have the benefit of being able to look at hundreds of client programs to see what IS working and HOW we need to generate leads, sales opportunities and new business for them.

We know what changes need to be made and how to make them. We have the new playbook.

In this workbook, we're sharing our framework for building a campaign that is connected, orchestrated and omnichannel. It engages prospects and educates them along their buyer journey in a highly personalized, highly connected way. It leverages today's technology platform and ensures you run a click-to-close program that helps your company grow.

I would be remiss in not stating how difficult this is to execute. It's harder than juggling a bowling ball, chainsaw and torch. It's more like juggling three bowling balls, three chainsaws and three torches.

However, with the right strategy, tactics, campaign framework and technology, it's possible. It's also likely to produce significant results if you invest in it, are patient with it and consider it something you do every single day.

If you're up for it, we're up for helping you do it.



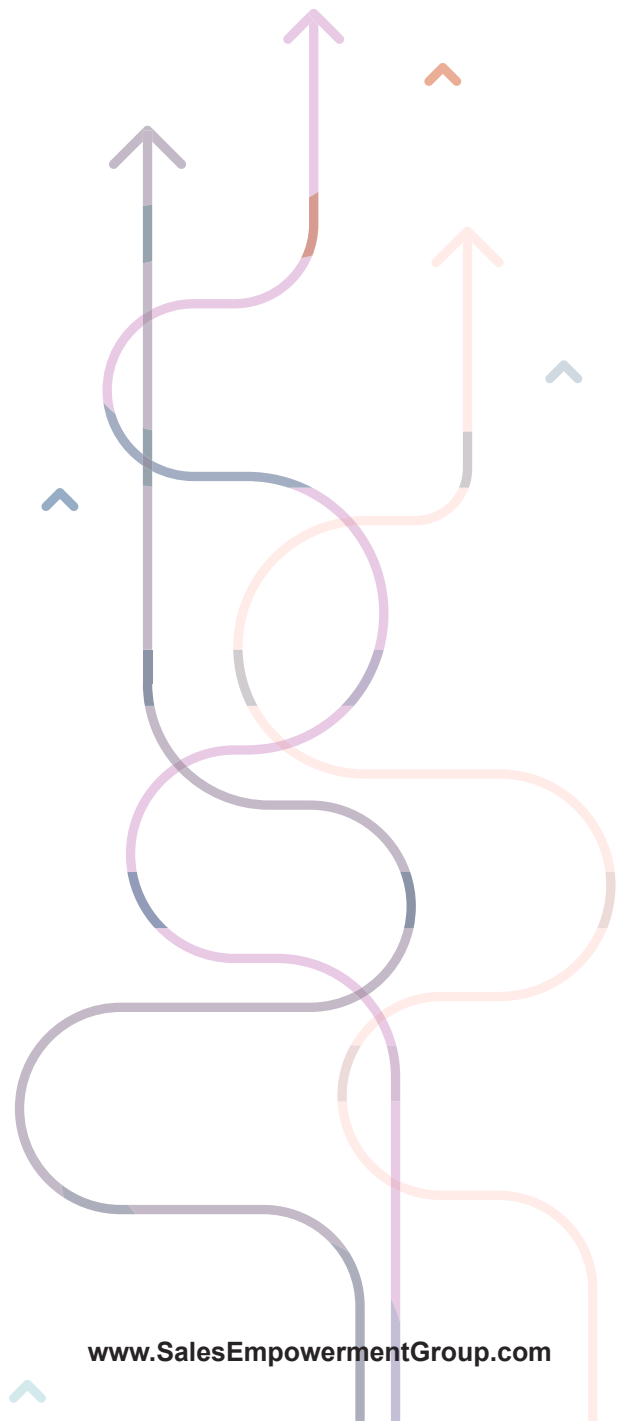
Mike Lieberman

Chief Marketing Officer

SEG

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Targeting the Right Prospects

The days of reach and frequency are long gone. You can no longer be everything to everyone. If you want your marketing to perform and shower your sales team with high-quality sales leads, you have to be laser focused.

To start, create a profile of your best prospect, or think about your favorite customer and create a profile based on that person. Personas are for people, not companies. Use the framework below to work through creating your persona.

Then you'll pick a single persona for your initial campaign.

To learn more about personas, selection, targeting and priorities, [check out this guide to creating buyer personas.](#)

What's Your Company's Big Story?

You've probably heard the saying, "If you don't have anything interesting to say, don't say anything at all."

This applies to marketing in today's cluttered, oversaturated digital marketplace. If your company's story isn't remarkable, it's going to be very difficult to cut through the noise.

If your company's story isn't remarkable, your campaign messaging won't be strong enough to drive the results you expect. We will cover campaign messaging in an upcoming section, but first we have to help create your company's big story.

Here are some questions to ask of your leadership team and an exercise you can run to try and create your big story:

1. What do you do that no other business in your industry, market or space can claim they do?
2. What pain, problem or challenge does this capability solve for your prospects and customers?
3. How do you prove that this remarkable capability solves the stated problem or challenge?
4. Who else (such as current customers or industry experts) will state that you helped them in this way?

The days of reach and frequency are long gone.

If your company's story isn't remarkable, it's going to be very difficult to cut through the noise.

One way to uncover the answers to these questions is to run a workshop with your leadership team. Carve out 90 minutes and as a team ask and write the answers to these questions on a whiteboard.

When answering question 1, make sure **no other company** can say anything similar. This is not about reality but rather about perception and what they say.

For example, if you think you have the best people in your industry, consider what your competitors are saying in a sales meeting with your prospect. Are they saying their people are average or are they also saying they have great people? Whether they do or don't doesn't matter. Having great people – even when it's true – is not a remarkable element of any business.

When answering question 2, make sure you're not working on handling sales objections but rather the actual issue facing the business that would have prompted the prospect to contact you.

When answering question 3, you need to have enough supporting information to make it believable. Use documentation, graphics, materials or website pages that support your statements.

When answering question 4, you need the physical social proof to back up your statements. This can include reviews, testimonials, videos and industry study documentation from respected sources.

Turning These Remarkables Into Your Big Story

Now that you know what makes your business remarkable, to tell this story effectively and in less than 10 seconds, you need to roll these up into your big story.

For example, consider messaging from a safety products company.

Their original story was: **We Have Over 1,000 Safety Products for Your Business**

That wasn't emotional, compelling or engaging for their target personas. While accurate, it wasn't enough to drive interest and business.

Their new story was: **Everyone Goes Home Safe Tonight**

Here are additional resources to help you create your company's big story:



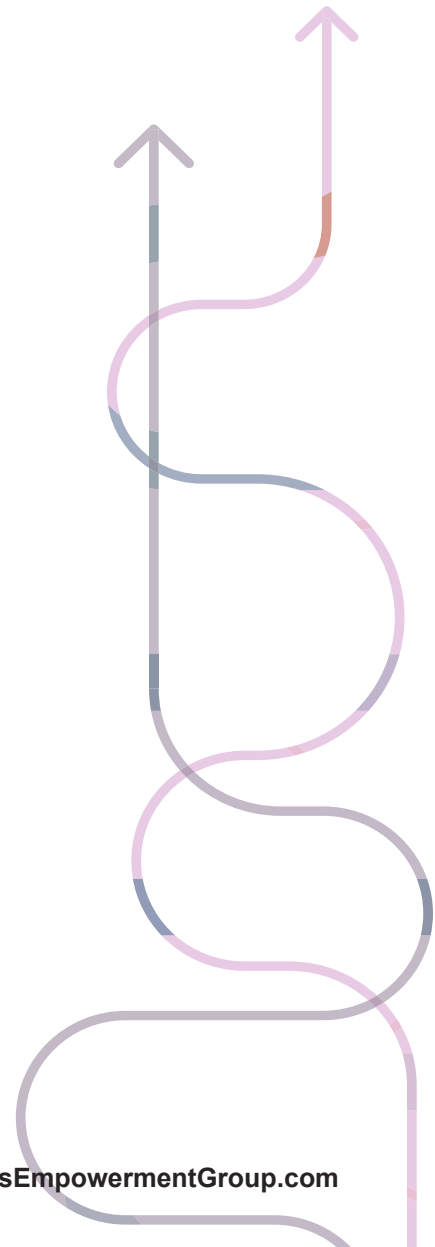
Your Company's Story Is Everything and Yours Gets a Failing Grade

READ BLOG →



Your Story Is Too Bland

WATCH VIDEO →



This was very emotional for their personas, who were tasked with keeping employees safe day in and day out. It was engaging because the next question was, "How do you do that?" And most importantly, it was differentiated. All the other companies were focusing on the products and discounts, while this company focused on the people and the desired outcomes – safe workplaces.

What's your big story? You can use the template below to start working it out. Don't be frustrated if it takes a couple of iterations to come up with something catchy and short.

Sample Big Story	Everyone Goes Home Safe Tonight
Big Story Idea 1	
Big Story Idea 2	
Big Story Idea 3	
Big Story Idea 4	

Use the template to put together your big story.

Defining the Campaign Approach – Demand Gen or Lead Gen?

With your story done and your personas defined, you're getting close to launching your first campaign. But first, we have to consider the two major types of campaigns – demand generation campaigns and lead generation campaigns – and determine which one is right for you.

To help, here are definitions and use cases for both:

Demand Generation Campaigns – In short, demand generation represents the marketing campaigns (a collection of tactics) that get your name, brand, content, products and services in front of the people who might one day need what you do. For more on demand generation, [check out this article from our blog](#).

Lead Generation Campaigns – These marketing campaigns produce people who are interested in your content, products or services and are ready to trade at least some contact information in exchange for that information, thus generating a new contact or marketing-qualified lead (MQL).*

*These people might be ready to talk to sales, but most of them are likely still early in their buyer journey and will need more nurturing until they are ready to talk with sales or be considered a sales-qualified lead (SQL).

You have to decide which of these campaigns you want to invest in. It's also feasible and, in some cases, appropriate to run both types simultaneously.

Here's more information on both to help you with your decision.

Demand Generation Campaigns	Lead Generation Campaigns
Used to generate interest	Used to generate net new contacts
Typically created by using ungated content	Typically used by creating gated (fill out this form) content
Typically requires paid media (paid search or paid social) to get your story in front of the people you want to hear your story	Can include paid media but usually leans more toward earning attention via organic sources and then converting those new people into leads via your website
Metrics that measure success are more about reach and audience; visitors to your website	Metrics that measure success are more quantitative like MQLs/net new contacts
Usually requires longer term commitment to publishing content that drives awareness until someone is ready to talk to you	Usually involves running specific targeted campaigns to produce specific metrics over a specific time horizon

What kind of campaign do you want to invest in? Use this comparison chart to help aid your decision.

Which type of campaign are you interested in creating? Or are you interested in running both simultaneously?

Creating a Campaign Story

Now that you have your big story and your campaign direction, you're going to need campaign messaging or stories for each of your planned campaigns.

Turning a big story message into multiple campaign messages can be done a few different ways.

Often when developing messages, you'll want to purposely layer in multiple meanings related to value, challenges and aspirations. In a campaign you lean into each meaning specifically to really drive it home.

Take for example messaging from Solver, one of our clients. "Everything Can Change Overnight" highlights the idea that we live in a chaotic, fast-changing world **and** that their platform can be implemented in a day, which is their differentiator.

From there, you'd create distinct campaign messages targeting both of these meanings.

When you create your big story, it's often in service of three to four pillars that represent both the challenges the prospect has and your specific strengths. These pillars often become part of your homepage story, but they should also be thought of as the starting point for campaign messaging.

Prospect triggers also make for strong campaign messages. If you know that prospects are likely to buy your product under certain circumstances, we recommend taking the big story message and, wherever possible, using it to run campaigns that target those triggers. It could be the same headline with different contextual copy and imagery for each one.

Here are some examples:

Company	Big Story	Campaign Story and Message
Safety Products Company	Everyone Goes Home Safe Tonight	How Safe Are Your People?
Health Insurance Storefront for Membership Associations	A Simplified Approach To Protect Your Home and Family	Everyone Benefits
Economic Development Corporation	Your Search Stops Here – You Can Have It All In Amarillo	Take Root in Amarillo
Document Solutions	The Future of Business Scanning – Scan by the Box	Don't Get Boxed In
Personal Electronic Record Storage Software	Don't Leave Them Searching for Answers	Securing Your Legacy Today Protects Their Tomorrow

Examples of applying your big story to campaigns and messaging.

When creating your campaign messaging, remember your very specific target persona. The more targeted the campaigns and the more personal you can make them, the more effective they will be.

Remember, each campaign has to roll up to the big story.

This is more work than you've probably done before, but it's what's required to produce campaign results.

The Cyclonic Buyer Journey

Very simply, the *buyer journey* describes what happens between the time a person becomes aware of a product or service and when they become a customer. This includes their experience as a customer.

Traditionally, marketers have looked at the milestones of the buyer journey as rigid and linear with limited steps that involved research, decision-making and purchasing. However, that's an oversimplification of the process.

We now know that the buyer journey is incredibly complex. It is, in the truest sense, a *journey* – full of twists and turns, rife with challenges and obstacles. Yet too many businesses have been slow or resistant to adopt this view. As a result, they've not only failed to deliver the ideal customer experience but they're also unwittingly hurting their own ability to grow.

However, most companies continue to use the simple, funnel metaphor to manage their prospect and customer journeys.

Conceived in 1898 by E. St. Elmo Lewis, [the sales funnel](#) was created as a way to help visualize the customer journey, from the moment people first become aware of a product to the time they become a customer. It's also known as the AIDA model, an acronym that describes each stage of the buyer journey.

Elegant and easy to understand, the traditional sales funnel offered a simple illustration of how people make purchases.

They come into the top of the funnel as prospects and come out the bottom as new customers, passing through three buying stages (slightly revised from the original AIDA model): awareness, consideration and decision-making.

For over 100 years, the funnel has been marketing dogma, unchallenged and unchanged.



We have boldly developed technology to take us deep into space and retired it as obsolete. Yet the funnel persists – large at the top and narrow at the bottom, pulling prospects through via *gravity*?

Today, buyers are in control.

Like so much of modern life, technology has drastically altered the buyer journey. The wealth of information available, and our ability to access it at any time, has provided consumers with unprecedented power. At the same time, the sheer volume of content we're exposed to has spawned incredible confusion and indecision.

We are overwhelmed with information, and not all of it is in agreement. As a result, buyers no longer follow a linear process with a clearly defined beginning, middle and end. Between blogs, websites, social media, emails and ads, people engage in a complex purchasing process that has them spinning in circles, unable to make a quick and confident decision.



Suffice to say, [the funnel is no longer an accurate representation](#) of what prospects experience. And it simply doesn't offer a realistic road map to guide them through this new chaotic buyer journey.

In theory, all of this readily available information should help educate prospects and streamline the buying experience, but it has had

the opposite effect. Information overload has extended the customer journey and infected it with uncertainty, anxiety and confusion.

The modern buyer journey is a violent and unpredictable storm. Prospects are pushed and pulled in every direction by disparate (and often conflicting) information. No longer linear, the buyer journey is now cyclical.

Prospects don't all enter at the awareness phase. They can enter at any stage and can encounter information from any stage at any time. They

Today, buyers are in control.



The average adult spends over 12 hours a day consuming media.

VIEW REPORT →

can bounce back and forth among stages or even become stuck in a stage. It's a dizzying storm, and your prospects are lost in it.

Forget the funnel. It has been replaced by a revolutionary new view – the Cyclonic Buyer Journey model. Using a series of interconnected cycles, it accurately depicts the chaotic experience and torrent of information prospects face.

To mirror that complex journey and account for the myriad sources of information that affect the decision-making process, the Cyclonic Buyer Journey features eight distinct stages.

Building Offers That Drive Campaign-Generated Leads

Whether you're running demand generation or lead generation campaigns, you're going to need offers.

Offers are educational content that people can consume while they're on their individual buyer journeys. The more compelling, interesting and targeted the offers, the better your campaigns will perform.

Offers need to be perfectly aligned with the stages of your prospects' buyer journeys and often answer questions they have during specific stages in their journey.

That's why we spent so much talking about the Cyclonic Buyer Journey above.

Here's an inventory of possible offer types along with their uses and the stages of the buyer journey where they are most often applied.

Type of Offer	Stage of the Buyer Journey
Social Media Posts and Messages	Early – Pre-Awareness
Whitepapers and E-books	Early – Awareness and Education
Tip Sheets and Checklists	Early – Awareness and Education
Templates/Workbooks	Early to Mid – Awareness and Education/ Consideration
Monthly E-Newsletter	Early – Awareness and Education
Blog Articles	Early – Awareness and Education

The funnel is no longer an accurate representation of what prospects experience.

Here are additional resources to help you understand and start using the new Cyclonic Buyer Journey for your marketing:



The Cyclonic Buyer Journey

VISIT THE WEBPAGE →



Smash the Funnel: The Cyclonic Buyer Journey

BUY THE BOOK →

Inventory of possible offer types matched with their uses and stages of the buyer journey.

Type of Offer	Stage of the Buyer Journey
Live and On-Demand Video	Early to Mid – Awareness Through Evaluation
Podcasts	Early to Mid – Awareness Through Evaluation
Live and On-Demand Webinars	Mid – Consideration and Evaluation
Office Hours	Mid – Consideration and Evaluation
Grader Tools	Mid – Education and Consideration
Audits	Mid to Late – Decision and Rationalization
Demos	Mid to Late – Consideration, Evaluation and Decision
Success Stories and Case Studies	Mid to Late – Consideration, Evaluation, Rationalization and Decision
Quotes	Late – Evaluation, Rationalization and Decision
Assessments or Consultations	Late – Evaluation and Decision
Free Trials	Late – Decision and Rationalization
References	Late – Rationalization and Decision

You should start thinking about offers for each stage of your buyer journey, and then we'll pair these offers with the appropriate campaign strategy in an upcoming section of this framework.

An important note here is that while you may be excited to offer late-stage buyer journey offers, like a demo, consultation or quote, these tend to appear as sales calls to prospects and will produce a low-performing campaign. Proceed at your own risk if you choose this direction.

A lot of people struggle to come up with the offers and ask, "What should we offer in our campaigns?" One of the best ways to answer that is to start mapping out the questions your prospects ask at each stage of the buyer journey.

Here's a pro tip: Your sales reps and customer service reps talk with people all the time, and they generally have the questions for each stage of their buyer journey. Reach out to them and include them in this step if you want to fast track this and be sure you're collecting the right questions.

Now you're ready to map your buyer journey with your prospects' questions and the offers you'll need for your campaign execution.

With this strategy work behind you, you're ready to evaluate and select from the wide variety of channels for your marketing campaigns.

Selecting the Right Set of Channels for Your Campaign

Today, marketers need to run orchestrated and omnichannel campaigns. Here's what that means:

Marketing Orchestration – Marketing orchestration is an approach that focuses not on delivering standalone campaigns, but on *optimizing a set of related cross-channel interactions that, when added together, make up a personalized customer experience.*

Just like a musical orchestra, every one of your touches is firing perfectly, at the perfect time, telling the perfect story, evoking the perfect emotion and creating the experience that moves people to buy – just like the music moves people at the symphony.

Omnichannel – Omnichannel refers to the ability to use ALL the necessary vehicles or channels to deliver the same message, story and offer so that your prospect sees and hears the same story from your brand regardless of platform or location. Whether they visit your website, see an ad, receive an email, do a search, notice you on social media, see you at an event, get a text or read a review, every channel is telling the same story, positioning you the same way and offering them the right content at the right time.

First, let's look at your channels. Think about your channels like tools in the toolkit – you almost always need multiple tools to get the job done, and having the right tools at the right time is critical.

You could also think about your channels like lanes in the highway. The more lanes you have, the faster your trucks can make their delivery, the more trucks you can use and the more products you could deliver.



Here is a list of the channels available to marketers:

- Social platforms (Facebook, Instagram, LinkedIn, Twitter, TikTok, YouTube, Medium, Reddit, Pinterest, etc.)
- Paid ads on the social platforms
- Email
- Events and conferences
- Influencers
- Partners
- Content publication (including speaking, webinars, video, written content and audio content)
- Your website
- Organic search (Google and Bing)
- Paid search (Google and Bing)
- Word of mouth/referrals
- Public relations
- SMS text
- Direct mail
- Traditional advertising (TV, print, radio, satellite, streaming)
- Digital advertising (banner, retargeting, syndication)
- Online reviews
- Networking
- Chat

Sometimes these get grouped together, too. For example, inbound marketing, demand generation and account-based marketing (ABM) represent a collection of some but not all of these channels.

Not every channel is right for every company or product. The key is to select and execute the right set of tactics inside the right channel to engage prospects and turn them into leads, sales opportunities and new customers.

In addition, most companies can't afford to use every single channel available. That means they have to prioritize channels and select the right set of key channels to focus on.

Marketers have so many options these days. It's likely that this list doesn't capture everything you might be considering. The uses, pros and cons are not even close to being comprehensive but should be used as a guide when deciding which tactic might be right for your industry, company, team and products or services.

You almost always need multiple tools to get the job done, and having the right tools is critical.



Now let's get to selecting the right campaign tactics for your campaigns.

We talked about a few specific types of campaigns, like inbound, demand generation, account-based and general brand awareness. Again, there might be other types of campaigns, but this represents 90% of what we see in our client base.

Note that you should consider a variety of tactics. Tactics like cultivating online reviews, attending conferences, working with partners and nurturing referrals are all solid marketing tactics that aren't campaign specific but should be part of your overall marketing efforts.

Designing Your Campaign

Now that your strategy work is behind you, it's time to start designing your campaign. [Use the template in Appendix 1](#) to take the work you've done above and put it together in a campaign brief. You'll need this to start looking at creative, timing, budget and performance expectations, all next steps in the process.

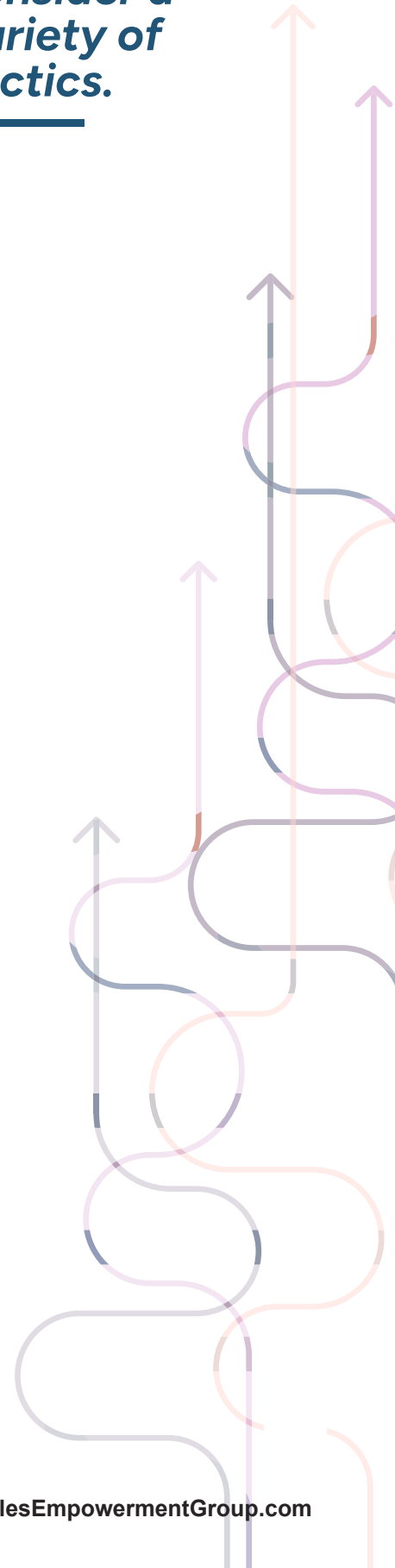
Adding the Campaign Creative

No campaign would be complete without the creative necessary to build out the assets you'll be using in the campaign. Remember, creative refers to both the words you use and the images you use in your campaign.

Typically, this might include:

- Paid social ad copy and design
- Landing page copy and design
- Email copy and design
- Paid search ad copy
- Social messages for ABM campaigns
- Copy and design of any written content you're publishing
- Scripting, graphics and design for any videos or audio content you're publishing
- Chat scripts

You should consider a variety of tactics.



- Direct mail copy and design, including any 3D or lumpy mail campaign copy and design
- Event-related sponsorships or promotional copy and design assets, including online events like webinars
- Copy and creative for banner ads, retargeting ads and content syndication promotions



Now that you have the targeting, campaign messaging, offers and tactics outlined, handing that information over to creatives should be enough to get them started on copy and design for any assets needed to execute the campaign.

I considered sharing some examples of campaign creative but decided that any of these examples would be very specific to individual campaigns and probably not helpful.



Instead, my guidance here is to hire, select or use people who have experience doing the copy and design work for similar campaigns at companies similar to yours.



Another option is to hire a team with a methodology that allows them to quickly get up to speed on your industry, company, campaign goals and campaign expectations (brand, leads, demand, etc.).



Both of these scenarios would allow the people to quickly understand your prospects and how they think, what the competitive market looks like and how to help your campaign creative stand out.

It's also important to look at all the copy and creative visually in its entirety, so you can clearly see what your prospects will see.

What ad sends them to what page? What offer do they get? What does the offer look like? What does the nurture look like post-download? What do the retargeting ads look like for people who don't convert? Look at everything in one place to ensure campaign consistency and a good prospect experience.

Defining the Campaign Timing

For smart CMOs, CROs and CEOs, marketing never stops.

That's especially true in today's digital world, where trends, technology and algorithms that drive results change regularly. To keep up, your digital marketing strategy should include an ongoing effort.

Look at everything in one place to ensure consistency and a good prospect experience.

But you'll still need to know how long an individual marketing campaign should last.

Digital marketing isn't a one-time effort, and while it can make an immediate impact, full optimization takes time. Even after you've achieved acceptable performance, ongoing optimization is critical to keep competition at bay and costs down.



One of the main advantages of digital marketing is the ongoing collection of performance data. By using Google Analytics and other post-click performance tools, you see what's working and what's not, and you can shift resources and creative energies accordingly.



The effective length of a digital marketing campaign varies widely based on factors such as your budget, industry, competitors, consumer habits and campaign style.

Still, there are basic guidelines that can be used as a starting point for setting up and measuring a campaign's success.

Typically, it takes at least 90 days to build momentum around a digital marketing effort, most of which generally extend six to 12 months.

Like traditional forms of marketing, digital marketing requires frequent impressions to make an impact. Customers need to see your brand and product or service images and message repeatedly before it sinks in.

Repetition builds recognition, trust and, ultimately, preference. And this takes time. On the other hand, if a specific message or image runs too long, advertising fatigue could sink in. In other words, when people see the same ad too many times, it becomes white noise and they stop noticing it.

While a campaign may last several months, a specific message should change more often. Changing creative every 45 to 60 days is ideal. Research shows that 45 days is about how long it takes a consumer to retain and recall information.

Marketing efforts involving simpler products or services – or from recognized brands – may call for shorter campaigns. For example, political campaigns and promotions for concerts, shows and events should generally run for a shorter time.

With most of the campaign strategy, creative and timing locked down, now we can start looking at how to set expectations around performance.

Research shows that 45 days is about how long it takes a consumer to retain and recall information.



Defining Campaign Performance and Expectations

One of the hardest aspects of marketing today is setting expectations around performance, measuring performance and using performance data to continue to optimize the campaigns over time. These are all areas we'll be discussing over the next few sections of this framework.

First, setting expectations around performance for campaigns isn't hard but does take some practice. Over time, you'll probably get better at this. However, it's not important how good you are at it in the beginning – it's more important that you do it.

Making mistakes (just accept that even the best ideas or plans don't always work) is a big part of marketing and learning from them is critical for moving forward and improving performance.

Let's start by defining what we think is going to happen as a result of the campaign we designed above.

You can use the scorecard in [Appendix 2](#) or one like it to set some performance expectations or goals out over the timing of your campaign and track it to see how well you're doing.

Goals are set for as many of the campaign-related quantitative measures available and then the actual performance is measured against our goals (expected performance). Those that overachieve get green indicators, those that slightly underperform get orange indicators and those that dramatically underperform get red indicators.

In this scorecard, the paid social ad click-through rate needs to be looked at. Why are people not clicking on our ads? This also indicates the email click-through rate is not doing as well as expected. What can be done to the email copy, format or link strategy to improve clicks?

One of the hardest aspects of marketing today is setting expectations.

Setting the Campaign Budget

You've probably heard this before: "Sounds great, but how much is it going to cost?" While that's not exactly the right question for management to be asking, you'll need to be prepared to answer it.

Knowing how you expect the campaign to perform is the first step. Instead of saying what it's going to cost, you'll be able to respond with: "An investment like this will produce these results."

By using the scorecard and performance projections section in the Appendices, you'll be armed with the expected results answer.

Regardless, you'll still need to be prepared with an estimate of the investment required. Here's how to calculate that number.

First, you need to know where you want to be to know how to get there. For example, let's say you need to generate 100 new leads that will produce 20 new sales opportunities, 14 proposals and seven new customers spending \$100,000 to \$700,000 in annualized revenue.

You'll need to back into which campaign tactics are required to generate 100 new leads. That means looking at each of the tactics in your campaign plan and attributing a certain amount of performance or lead generation to each of those tactics over the campaign.

Then attribute the projected cost or investment in each of the campaign tactics required to hit your goals.

Now you have a budget with a reasonable, attainable and projectable set of goals. Once this is approved, it's full speed ahead on the campaign.

You can take this approach across your entire marketing and campaign effort over the course of the year to create both the financial investment requirements and the expected results.

Now you're almost ready to launch.

Optimizing the Campaign

You might have noticed I said in the above section that you're ALMOST ready to launch. That's because we still haven't talked about what's required to get your campaign to actually produce the projected results from the above section.

You need to know where you want to be to know how to get there.

If every marketing campaign worked better than expected every time, you wouldn't be reading this document.

The facts are startling – only about 10% of the people we surveyed hit their revenue growth goals every single month for the past two years.

That tells me people are struggling to generate leads.

It's also difficult to get marketers to publicly admit their campaigns aren't working, so there's no data on the historical performance of marketing campaigns, but our anecdotal information supports this fact.

It's incredibly difficult to plan, build, execute and optimize any marketing campaigns in today's highly saturated digital market.

That brings me to this important section of the framework – optimization.

You should plan on optimizing your campaign regularly by making tweaks – sometimes small, sometimes not so small – over the life of the campaign to drive performance up and to the right. The lack of optimization is the reason I think most marketing campaigns fail.

With these techniques, you now have a methodology and framework to continuously work on for analyzing and optimizing your work to produce leads, sales opportunities and revenue from new customers.

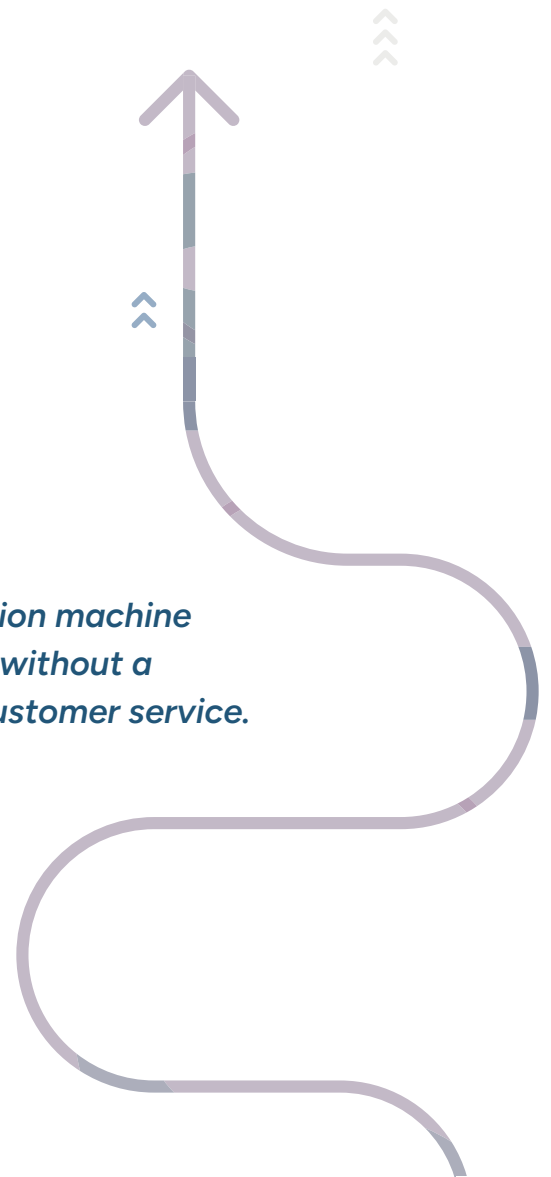
Technology

I'm going to be no fluff – you can't build a revenue generation machine that produces leads, sales opportunities and new revenue without a technology platform that supports marketing, sales and customer service.

That means a marketing automation tool, customer relationship management (CRM) system, content management system (CMS) for your website, payment product to accept transactions online and customer service tool to take care of your customers.

You can use four best-in-class products and integrate the data so it flows through all the tools, or you can buy a platform tool that brings all four tools in a single product.

Only about 10% of people we surveyed hit their revenue growth goals every single month for the past two years.



Regardless, a strategy before tactics approach to technology would mean you sit down and make decisions around which technology configuration works for your company and your business goals.

Never give up.

What's Next?

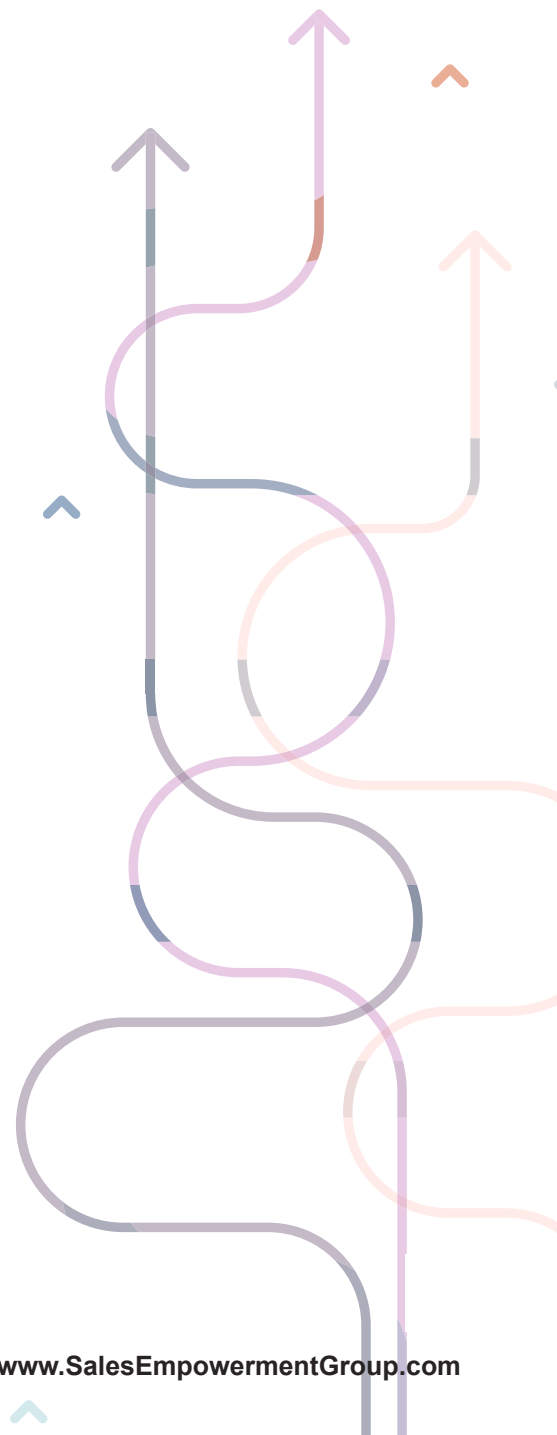
Now you have everything you need to plan, build, execute and optimize an orchestrated omnichannel marketing campaign. What's next is doing it.

Having used this framework for many clients over many years, there is one simple piece of advice I can give you – never give up. Marketing doesn't stop. It doesn't take a break.

Remain diligent in your approach. While your tactics and execution might change, your effort and investment can't stop.

Lean into the information included in this framework and you'll see success. If you need help, resources, expertise or guidance around exactly how to execute this framework, the team at SEG is available.

[Just head to our website](#), chat, email, call or schedule time to talk with us. We're here to help anyone who is trying to grow their companies with strategy, tactics, campaigns and technology.



Appendix 1

Sample Campaign

Campaign Name	Targeted Persona	Message	Offer	Tactics
Campaign 1: Customer Cross-Sell and Upsell	COOs at manufacturing companies with over 1,000 employees	Your team can operate 50% more efficiently	Early <u>Infographic</u> : 10 Secret Ways COOs Are Driving Massive Efficiency Inside Their Manufacturing Operations Mid <u>Webinar (Live and On-Demand)</u> : How Progressive Manufacturing Companies Are Slashing Operating Costs Late <u>Operational Assessment</u> : We'll Uncover Operational Improvements You Can Make in Our Initial 30-Minute Meeting	<ol style="list-style-type: none">1. Two emails a month during campaign2. Website with campaign landing pages3. Content publication (see offers)4. Lead nurturing for content conversions5. Customized chat for specific pages6. Social media promotion of campaign content7. Paid social for campaign content offers8. Paid search for campaign content offers9. Conference specifically targeting identified personas

Appendix 2

Sample Scorecard

Campaign Scorecard	Month 1			Month 2		
	Actual	Goal	R/O/G	Actual	Goal	R/O/G
Paid Social Ad Impressions	600	550	Green	650	660	Yellow
Paid Social Ad Clicks	200	250	Red	240	280	Red
Paid Social Ad Leads	55	50	Green	60	60	Green
Paid Search Ads Impressions	1,102	1,000	Green	1,256	1,200	Green
Paid Search Ads Clicks	110	100	Green	133	120	Green
Paid Ads Leads	56	50	Green	62	60	Green
Landing Page Visits	43	40	Green	62	55	Green
Landing Page CR	29%	30%	Green	33%	35%	Green
Landing Page Leads	12	12	Green	20	19	Green
Website Visitors	4,976	5,000	Yellow	5,613	5,500	Green
Website CR	1.55%	1.5%	Green	1.59%	1.6%	Green
Website Leads	74	75	Green	89	88	Green
Emails Sent	61,432	60,000	Green	64,955	65,000	Green
Email Click-Through Rate	18%	20%	Yellow	17%	20%	Yellow
Email Open Rate	2.5%	3%	Yellow	2.9%	3%	Green