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The Customer —————
————— Engagement Book

Adapt **OR** Die

Foreword

Standing still is the fastest way to fall behind.

As marketers, you understand that adapting isn't just necessary. It's essential to survival and growth.

Since founding MoEngage in 2014, I've witnessed firsthand how embracing change, leveraging customer insights, and adapting swiftly to shifting behaviors have empowered brands to thrive. That's why, at MoEngage, customer obsession isn't just a core value. It's our purpose.

We believe deeply in the power of data-led customer engagement, personalization, and thoughtful technology to elevate customer experiences and ultimately drive meaningful business outcomes.

In this book, you'll find an extraordinary collection of wisdom from leading customer marketers who've navigated change successfully. They've generously shared their practical lessons learned to help you confidently face your next marketing challenge. From harnessing real-time analytics to executing impactful omnichannel strategies, every chapter reflects the real-world complexities and triumphs that marketers like you encounter every day.

I encourage you to internalize the powerful narratives shared here, each illustrating why it's vital to place the customer at the heart of everything you do. After all, adapting to change isn't about avoiding risk; it's about seizing opportunities, deepening customer connections, and positioning your brand to lead.

My hope is that you'll take these stories, act boldly, and write the next chapter of your marketing journey with clarity, empathy, and innovation.

Here's to embracing change—and thriving because of it.



Raviteja Dodda
Co-Founder and CEO
MoEngage

Special Thanks

We wanted to extend our deepest gratitude to MoEngage's customers, whose passion, challenges, and dedication inspired us to create this book. Your experiences motivate us to explore new possibilities and pursue excellence every day.

A heartfelt thank you to all of our contributors who generously shared their insights, expertise, and compelling stories. Your openness has brought tremendous value to every page. To the MoEngage team—thank you for your unwavering commitment, enthusiasm, and tireless efforts in bringing this project to life. Finally, we'd like to express our profound gratitude to our CEO, Raviteja Dodda, whose bold vision, endless encouragement, and passion for thinking big inspire us to continuously challenge ourselves and dream beyond conventional limits.

We couldn't have done it without each of you—thank you for making this journey truly remarkable!

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Introduction	05
Change	06
Impact	22
Technology	36
Influence	54
Strategy	66
Data	82
Framework	100

Introduction

Customer engagement isn't just about marketing. It's about people, relationships, and adapting to the constant change inherent in both.

As a marketer, you're constantly challenged to do more, be more creative, and deliver results faster. You're navigating rapid change, shifting consumer behaviors, and an increasingly complex technology landscape. Amid this pressure, it's easy to lose sight of why you got into marketing in the first place — to build meaningful connections with people.

More than ever, customer loyalty isn't just nice to have; it's essential for growth. Acquisition matters, but retention is truly the heartbeat of sustainable success. Yet, despite knowing this, marketers often find themselves trapped in short-term thinking, pressured to deliver quick wins and immediate returns.

This book invites you to step away from the noise and reconnect with the core purpose of your role: creating compelling experiences that keep customers coming back. Drawing on insights and real-world experiences from marketers at recognized brands like Meta,

WealthSimple, and Grammarly who've successfully navigated constant change, we'll share actionable frameworks, adaptive strategies, and proven techniques to help you build a resilient foundation for customer engagement. You'll learn how to continuously adapt, leverage evolving technologies, and transform customer data into dynamic insights that create lasting connections, even as the landscape shifts.

The purpose of this book is to enable your continued success by helping you adapt to constant change. Through these authentic stories of successes, challenges, and everything in between, you'll gain fresh perspectives and actionable insights that empower you to unlock new possibilities.

The future belongs to marketers who prioritize genuine connections, confidently build internal buy-in, and thoughtfully use technology to enhance (not replace) the human touch. For marketers ready to lead rather than follow, to transform customer engagement from an empty buzzword into a powerful competitive advantage, the time is now.

Ready to redefine what's possible?

Let's get started.





CHAPTER ONE

Change is inevitable

“I think embracing change is the job.

It's not a component; it's not a department. It's not something you put on a PowerPoint slide. It's not a meeting you have. Today's marketers have to be masters of navigating change because customers, technology, and the marketplace are changing every single day.”

**JUAN
MENDOZA**

CEO, The Martech Weekly

Change is



inevitable.

It's an inescapable fact of marketing.

The job is never finished.

Nothing in the culture or society is what it was twenty, ten, or even five years ago. Marketers can no longer confine themselves to the same tired tactics and expect to get results. Assuming that what worked on a platform yesterday will still work today or that targeting stereotypical attributes like demographics will make any impact is just asking to be ignored as consumers scroll right past. To stay relevant, marketers must adapt to a nuanced landscape where customer expectations and behaviors are shifting faster than videos in a TikTok feed.

Juan Mendoza is no stranger to the modern marketing landscape. As CEO of global media and research company The Martech Weekly, Juan is focused on providing marketers with the insights they need to keep up with the most significant shifts in marketing and technology. His background as a marketing technology strategist gives him the foundation to analyze industry trends and transform them into meaningful reports that marketers can use to better leverage technology and design consumer experiences.

Why the marketing landscape is shifting

Changes in the marketing landscape always reflect broader changes in culture, society, and economics — three major areas that influence the world and how consumers respond to it.

Cultural: The rise of the personalized internet

Juan cites technology, particularly the internet, as a key cultural force that's shaped consumer behavior in recent years.

"The internet has its own culture," he points out, noting that global distribution means "beliefs and attitudes and cultural norms are no longer really constrained anymore to geographic location."

Smartphones have had the effect of shrinking the world into pocket-sized screens that nearly every consumer carries with them throughout the day

As of 2024, 91% of Americans owned smartphones,¹ and they spend an average of 4 hours and 2 minutes per day using them.² (At least, that's true of adults. For Gen Z, it's just over six hours.³)

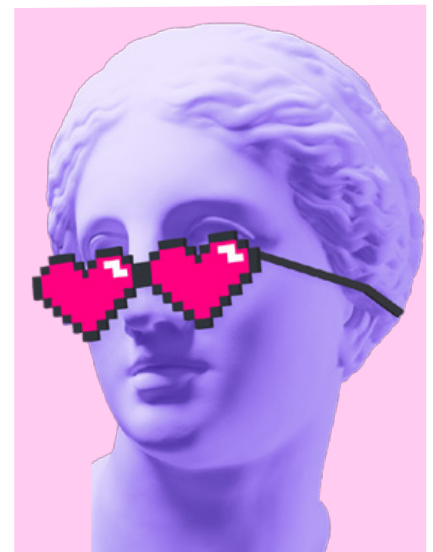
91%

They're spending a lot of that time on the internet and social media, interacting with diverse ideas and establishing subcultures that couldn't have existed before. Juan says these global connections are giving rise to new norms and shared experiences that disrupt traditional marketing demographics.

"Culturally now, with the context of the internet, you've got memes, you've got shared norms, you've got viral movements, you've got influencers and you have all of these cultural things that are changing perceptions," he explains.

This includes consumers' perceptions of brands and marketing. Consumers living in curated online cultures expect brand messaging to cater to their preferences, needs, and interests.⁴ They're looking for personalized VIP experiences that deliver relevant, engaging content,⁵ and they have no problem shopping around until they find brands that give them what they want.

Spending so much time immersed in the activities and opinions of their peers further influences consumers' perceptions and desires. Trends and subcultures aren't just shared norms; they're powerful forces that can drastically alter how a brand's messaging lands with a particular audience.



To capture and keep attention, marketers must look beyond basic demographics and deliver targeted campaigns that offer the interactions consumers have come to expect within these emerging cultures.

Societal: New Platforms And Free-Form Discussions

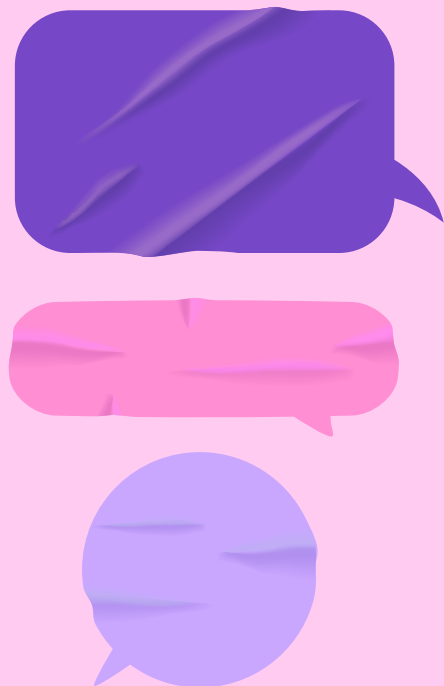
COVID-19 opened the door for many cultural changes by forcing the world to move almost all in-person interactions online. New platforms like Temu and rising stars like TikTok became adept at responding quickly to consumer needs and demands. Instagram changed the game for brands even more when it rolled out in-app checkout in 2020. By 2022, more than half of U.S. adults reported making purchases through social media, and almost all of them said they'd do it again.⁶

Brands responded by leaning into social platforms as a sales channel. As of 2023, 58% of B2C brands were using social media to sell their products and services.⁷ The same year, 24% added direct-to-consumer (D2C) channels to take advantage of the general increase in online shopping.⁸

But consumers aren't just looking for brands as they scroll through their social feeds. They're busy posting and reacting to posts — activities that, Juan says, could give rise to increasingly volatile interactions in the coming years as more platforms "reduce the amount of fact-checking that they do and allow more people to openly express themselves on social media." He warns that marketers will have to think more carefully about how to monitor and adapt to the conversations consumers have around their brands and products in this "more open, free-form internet."

"As more people share online, as more people engage with each other, there's going to be more divisiveness," he explains. "There's going to be more information that you probably don't want to be associated with your brand."

Building and maintaining brand loyalty will require striking a balance between allowing free discussion and enforcing guidelines that create an environment where consumers feel welcomed and comfortable.



Economic: The Impact Of Inflation

The current economic state poses a challenge for brands as they seek to respond to rapid changes in consumer expectations and shopping habits. Juan points out that, although inflation rates have dropped from 9.1% in 2022 to 3% in 2025,⁹ marketers still feel the impact on their ability to procure tech and execute campaigns.

Consumers are also pulling back on spending, which makes it harder for brands to sell non-essential products — and strains budgets further. Juan encourages these brands to look beyond offering discounts to attract customers and instead start "elevating the value that a customer gets ... and really focusing on giving that message to the consumer."

Messaging that demonstrates how a product meets a specific need (like enhancing quality of life) or aligns with a particular expectation (like providing an indulgent experience) can make consumers more willing to invest in discretionary purchases.¹⁰



“Because of the inflation rate and the economy where it’s at, a lot of marketers are struggling even to get enough budget to drive that consumer demand,”

/Juan Mendoza
CEO, The Martech Weekly

Tech, Data, And The New Customer Journey

Delivering the right message at the right time isn't as straightforward as it used to be. As recently as the 1980s,¹¹ most consumers got their information and entertainment from the same few channels. Marketers could largely predict what their audiences would be reading or watching and deliver above-the-line campaigns that captured widespread attention.

Thanks to social media — and, more recently, chatbots built on large language models (LLMs) — marketers no longer have this assurance. In fact, Juan says it's become almost impossible to know what consumers are doing before their first interaction with a brand.

"You can't really pattern match most customer experiences," he points out. "You might go to a shop, you might see something in the shop window, go, 'Oh, that's interesting.' Six months later, you might search for it because you're interested, or maybe a friend just bought that product, you go check it out at their house — you're going to have millions and millions of those scenarios that are all influencing a buying decision for a customer."

Many of these cryptic interactions happen on social platforms. Sixty-four percent of internet users now discover brands through some form of social media, including YouTube and Q&A sites like Reddit.¹² Tracking typical metrics like follower count, impressions, and conversions only tell part of the story. Customer's motivations stay hidden behind the graphics inside social analytics platforms, leaving marketers with little insight into what leads their audiences to particular posts or profiles.

Some consumers condense the journey of discovery into a series of LLM interactions. Asking ChatGPT or Claude for answers is faster than scrolling through endless Google results, social feeds, and forum responses. Why spend hours searching when a quick "conversation" with a chatbot can deliver individualized product recommendations in just a few minutes?

Marketers could, in theory, start leveraging these interactions as revenue drivers if consumer or usage data were available in the same way it is today with the SEO industry. But so far, LLM platforms are leaving brands in the dark — and the increasing data regulations across other channels are making personalized messaging even more of a challenge.

2018 kicked off major changes in data privacy with the arrival of the EU's General Data Protection Regulation (GDPR). California followed suit with the 2020 Consumer Privacy Act (CCPA) and 2023 Consumer Privacy Rights Act (CPRA). More recent regulations, like the EU Digital Services Act and Digital Marketers Act,¹³ have dramatically impacted how brands collect, disclose, and manage consumer data.¹⁴ Add to that the increased nuance in smartphone privacy settings,¹⁵ and marketers find themselves with limited data on which to base personalized campaigns.

Embracing Change: A Marketer's Core Job

Such unpredictability has become so ingrained in the marketing world that Juan believes embracing change is no longer just part of a marketer's job — it is the job.

"It's not a component," he says. "It's not a department. It's not something you put on a PowerPoint slide. It's not a meeting you have. It's actually marketers having to be masters of navigating change."

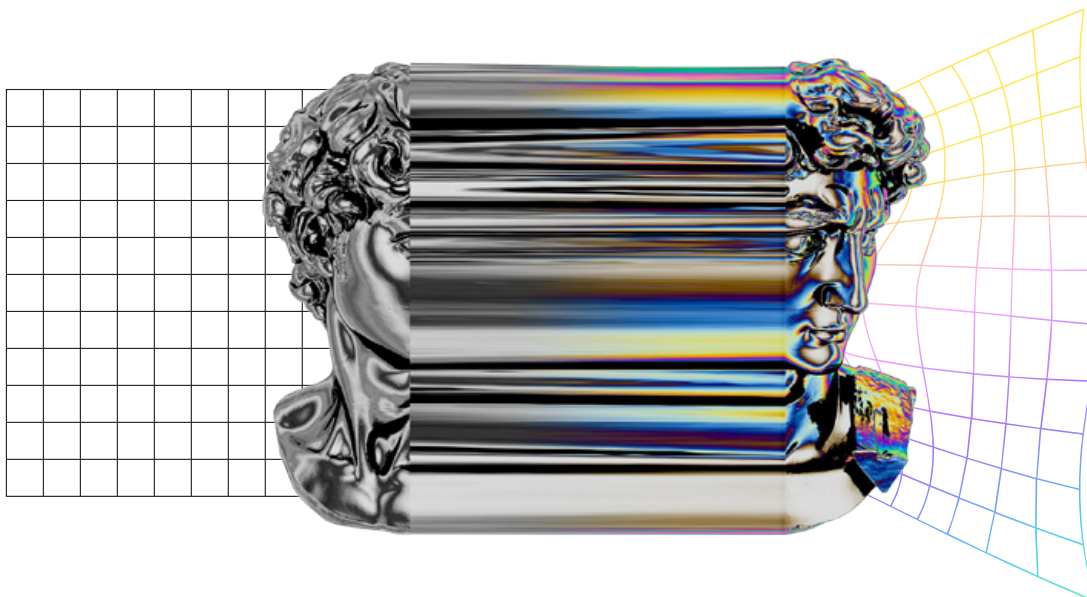
Uncovering The Essential "Why"

Navigating change means relying on more than just quantitative data. While metrics provide an interesting picture of how consumers interact with a brand, numbers alone don't offer any insight into why people do what they do.

He advises marketers to get out of the digital world and have real conversations with customers to uncover the details of the "why." Having this qualitative data helps prevent mistakes that can result from focusing solely on numbers. Knowing the underlying reason behind a pattern like increased sales of a particular product or service could mean the difference between wasting money on a generic marketing campaign that falls flat and creating a timely experience that customers remember forever.

“There’s a chasm between the how and the why...I think we need to jump over the chasm, and more marketers need to embrace the chaos of genuine intellectual inquiry.”

/Juan Mendoza
CEO, The Martech Weekly





Adapt Or Die?

Responding to the "why" of their customer base enables brands to stay relevant — which, Juan says, is essential as consumers continue to demand personalization. Brands that default to following the latest popular trend undermine their ability to differentiate and run the risk of becoming commoditized. But marketers who take the time to investigate the reasons behind trends and behaviors have the opportunity to stand out with a unique value proposition that resonates.

Delivering on these propositions starts with an understanding of consumers' basic expectations, which Juan describes as "thinking about it from a perspective like, 'Okay, what are those core things that really, really matter to the customer, and how should we embrace those?'"

Features like consistent quality, reliable service, and easy returns have become commonplace and are now essential to keeping customers engaged. A bad experience at any point in the buying lifecycle disrupts the expected VIP experience.

Disappointed customers don't become repeat customers. Instead, they go in search of brands that do a better job of meeting their expectations — while those that failed to do so struggle to attract new customers to take their place.

Beyond the basics, marketers must look to the broader cultural, societal, and economic forces influencing consumers' behavior and use those forces to inform how best to serve them in their daily lives.



The Perils Of Irrelevance

Juan points to the classic example of Netflix and Blockbuster to illustrate what can happen when a brand doesn't adapt to the changing ways in which consumers experience the world.

According to the story, Netflix CEO Reed Hastings started the company after Blockbuster attempted to fine him \$40 for a late return on a rental. In response, he decided to create a business model that allowed customers to keep or exchange rentals whenever they wanted. The direct mail format was more convenient and offered a better selection, and the monthly fee model meant Netflix made money no matter how long people held onto their DVDs. And that was the beginning of the end of Blockbuster, which filed for bankruptcy in 2010.

While the account may be a piece of marketing fiction,¹⁶ the lesson is clear: Brands that don't respond as consumers adopt new habits and preferences risk becoming irrelevant — and disappearing completely.

Responding means looking beyond metrics with tools that capture the nuances of the "why" and "how" behind customer behavior. It means looking at those nuances in the context of broader cultural and societal trends, and being ready to experiment with new tactics and platforms that fit the context of people's daily lives.



Innovating For Long-Lasting Impact

A consistent commitment to innovation can enable a brand to respond to changes quickly and stay relevant for decades. A brand in the travel industry that Juan worked with mastered this approach by being one of the first to offer online ticket sales and embrace technologies like email, SMS, and cross-channel personalization. The brand was able to build an extremely high-converting upsell flow that they continued to improve over the span of 20 years.

After COVID, the brand revisited how to improve across its marketing channels and decided to launch a personalized experience called Next Best Destination. The campaign leveraged data to point customers to their next trip or experience based on past preferences and habits.

"That was wildly successful," Juan recalls. "Talking millions and millions of dollars of incremental revenue just by giving that customer a little nudge towards,

‘Hey, maybe you should think about your next holiday.’”

Combined with recommendations for personalized add-ons during booking, the airline used Next Best Destination to cater to customers' life situations and needs. Marketers can take a cue from the brand and focus on developing a culture of innovation that enables them to rapidly develop and launch personalized campaigns that guide consumers toward their next purchase. Monitoring shifts in the culture provides the context necessary to meet customers where they are, anticipate their next actions, and create engaging campaigns that deliver value and drive revenue.

Adapting And Thriving In Change: Essential Skills For Marketers

Evolving cultural forces, emerging societal changes, and ongoing economic challenges combined with rapid technological developments will continue to impact consumer behavior in the coming years. But with the right mindset and skills, marketers can learn to adapt — and even thrive — in the face of change.

“I would say overall, the job of a marketer is leveraging change. Consumer behavior changes, new technology, data experiences, content ideation. You’ve got all these tools of change in order to enact growth ... So that’s what I would say, is that change is the job.”

“But there are core things that never change with people. Everyone’s going to feel sad, everyone’s going to feel happy, everyone’s going to feel hungry. Everyone needs to sleep. There are so many things that do not change for people in general. That is your bedrock.”

“But off the back of that, embracing change is definitely the job of marketing today. There is no sticking your head in the sand and waiting for customers to come anymore. You have to be at the forefront of change. There’s no way around it.”

JUAN MENDOZA

CEO, The Martech Weekly

Juan recommends eight ways to develop this resilience:

Mindset

Embrace risk.

Get comfortable challenging the marketing status quo at your company. Speak up when you identify changes that can better serve your customer base, and push for quick implementation.

Be curious.

Develop a genuine interest in what your customers are doing and saying. Ask the "why" questions, and incorporate what you learn into your campaigns. Customers will notice (and appreciate) that you're paying attention

Be willing to experiment.

Don't worry if you don't have all the answers. Launch something without knowing the outcome, and see what you can learn. Sometimes, that's the best way to "make a significant change in experience and have that big leapfrog moment in a company," says Juan.

Create alignment.

Learn how to have the hard discussions and debates required to get buy-in from stakeholders across your company. Practice developing and pitching business cases that lead the way toward mutual agreement on new marketing initiatives.

Skills and Best Practices

Learn to listen to customers.

Use social listening tools to monitor the conversations consumers are having around your brand. Pay attention to social media mentions, discussion threads, and reviews, and get involved in conversations to develop relationships and encourage brand loyalty. Apply what you learn to improve targeting and personalization in future campaigns.

Develop tactical skills.

Make sure you understand how to build campaigns, design experiments, and launch quickly in response to consumer behavior. Practice applying insights to iterate on campaigns over time. Learn how best to leverage your Martech stack, and work with your tech team to ensure you have the right tools to deliver the best possible personalized experiences.

Read widely.

Spend one or two hours a week learning from high-quality research and media in the marketing space. Stay on top of updates to maintain a clear perspective on how the industry — and related technology — is changing. Pay attention to what competitors are doing to get a better understanding of how new tech is influencing today's campaigns.

Build relationships.

Make sure you understand how to build campaigns, design experiments, and launch quickly in response to consumer behavior. Practice applying insights to iterate on campaigns over time. Learn how best to leverage your Martech stack, and work with your tech team to ensure you have the right tools to deliver the best possible personalized experiences.

In addition to adapting their skills and mindset, marketers must also rethink their approach to engagement. The technologies, metrics, and campaign designs of the past aren't sufficient to satisfy the modern customer. To truly impact the bottom line, marketers need to learn how to connect engagement metrics to outcomes and create campaigns that maximize ROI.

That means abandoning the approach of treating customers like numbers and learning to cultivate long-term relationships that deliver consistent value. In the next chapter, we'll examine how successful marketers are connecting the dots between customer engagement and their organization's bottom line.

Key Takeaways

- Embracing change is the core job of today's marketers.
- Customer journeys are no longer linear and now involve dozens of touchpoints that span online and offline interactions.
- The rise of the internet, increasing smartphone use, and a changing social media landscape have increased consumers' expectations for relevance and personalization.
- The ability to adapt quickly to changing consumer preferences and behavior is critical to staying relevant in the face of rapid change.
- Quantitative data doesn't tell the whole story; marketers need to look beyond numbers and ask why consumers behave the way they do.
- A mindset of curiosity, experimentation, and continuous innovation can help marketers thrive in the face of change.

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Impact

on the
bottom line



“Retention equals brand loyalty. So keeping your customers engaged with positive feelings when they interact with your brand, that’s key.”

**STACEY
HUNSDON**

CRM/Lifecycle Marketing Manager
at a major streaming service

“All things being equal, you take Company A and Company B: Company A does acquisition better, Company B does retention better. I would always bet on Company B.”

**NATALIE
MILES**

Staff Product Manager for Martech
Grammarly



Traditional marketing is broken.

**For too long,
brands have
treated
customers like
transactions**

— pushing discounts, chasing clicks, and hoping short-term wins will lead to long-term loyalty. But that's not how relationships work, and it's not how sustainable growth happens. One-and-done offers don't create lasting connections.

Today's consumers expect more. They want brands that engage with them, not just sell to them. That means moving beyond outdated legacy systems and vanity metrics. It means investing in technology

that enables real interactions, captures meaningful insights, and proves that engagement drives revenue. The best way to do this is to connect customer engagement to the organization's bottom line.

Connecting Engagement To The Bottom Line

Even with recent advancements in technology, marketers face the challenge of demonstrating how engagement benefits the bottom line — and building a business case for continued investment in campaigns and technology.

Natalie Miles, Staff Product Manager for Martech at Grammarly, and Stacey Hunsdon, CRM/Lifecycle Marketing Manager at a major streaming service, have successfully faced and overcome this challenge. Stacey's background in email marketing and Natalie's previous experience with marketing operations, Martech, and personalization inform how they prove the impact of engagement in their current roles.

For Natalie, a focus on engagement means zeroing in on "the health of our long-term customer relationships, making sure they're nurtured by consistent engagement touchpoints and helping to drive predictable revenue [while] reducing risks associated with high churn."

Find Your "North Star" Metric

This "North Star" metric quantitatively defines the value that customers get from a company and enables marketers to track the long-term progress of their engagement and growth efforts.¹

Factors like business type, business model, and main revenue drivers all play a role in determining the best North Star metric for a given brand. But it should always be something that marketers can measure and respond to quickly.

"Your North Star metric should not be LTV," Natalie says. "It needs to be something that can be actionable but has a direct correlation to LTV."

Instead, marketers must choose a metric that measures consumer behaviors associated with retention and allows them to trace the impact of these small actions through a hierarchy of metrics that connects to broader business objectives.

Stacey suggests making incremental revenue the main target and designing personalized campaigns to guide consumers, step by step, towards actions that will continually increase ROI over time.

The process starts with knowing where to aim: a single metric that guides a brand's entire approach to marketing.



Use Data To Measure Campaign Success

You'll discover that a common theme in this book is the idea that centralized data from across all channels is key to delivering engaging experiences that drive retention and support growth. Keeping data in one platform provides a full picture of customer behavior that informs marketers' engagement efforts.

"I very much believe in having a centralized source of customer truth where you collect your event and behavioral data," Natalie says.

As data is collected, patterns and behaviors emerge among active users and customers. Marketers can draw on these patterns to quickly identify the best strategies to encourage continued interaction.

Demonstrate The Impact Of Engagement

However, identifying which initiatives to implement can be tricky.

"Retention usually ends up being the biggest black box in terms of different growth states," Natalie explains. A long-term effort like retention is hard to measure within the confines of a time-bound campaign, so she recommends campaigns that demonstrate the value of keeping customers engaged over shorter periods like a month or a year.

To demonstrate this "incremental value," marketers can take Stacey's advice and design personalized campaigns based on the revenue-driving actions behind the North Star metric. Running the campaign for a specific amount of time provides measurable results of short-term impact that can predict the broader outcomes of continued engagement and retention.

Increasing customer retention rates by 5% can boost profits by 25%,² and better engagement overall can increase order size anywhere from

5% - 85%³

"And this data should be stored in a way that allows you to activate it across your other marketing tools."

This might look like introducing a new product, creating an additional use case, or addressing an area of high churn — whatever initiative has the best chance of adding value to the customer's relationship with the brand.

Stacey saw these benefits emerge through a campaign she ran during her previous role at a bank. "I put together a welcome program for checking accounts when I was there, and it had a 45-day life cycle," she recalls. "And by the end of that program, we could see what uptake people had in other products — if they adopted a credit card or moved a mortgage."

Using a holdout group demonstrated how effectively the campaign supported retention. A holdout group is the marketing equivalent of a control group in a scientific experiment: a subset of people who don't receive any messaging during the campaign. Deliberately excluding some consumers establishes a comparative baseline to help marketers understand exactly how much engagement increases in response to a campaign.

As the campaign ran, Stacey demonstrated its impact to stakeholders through a series of reports. "Every 90 days," she says, "I would produce a report that would show what the impact of that program was from start to finish and be able to prove the ROI of customer engagement."

The Challenge Of Connecting Engagement To Impact

Stakeholders can expect to see more of these reports now that **51.9% of B2C marketers are focused on "increasing customer engagement or loyalty."**⁴ But gathering data to demonstrate the benefits of this focus presents challenges when it comes to measuring impact across channels in a marketing landscape that seems to change from moment to moment.

Uncovering The Essential "Why"

Using an approach like media mix modeling (MMM) helps marketers better visualize the value of engagement efforts.

MMM tracks how much a company spends on each engagement channel and makes it easier to evaluate ROI.⁵ The unified data helps marketers connect channel investments to revenue, even in scenarios where consumers travel back and forth between platforms and perform dozens of interactions before converting.

"These channels don't operate in isolation," Natalie points out. "There are halo effects, and channels can amplify each other. And so you really need to be looking at all of them to understand what the impact of an individual channel is and then the impact of these channels on each other."



Getting Specific About Attribution

But MMM alone doesn't always clarify exactly which channels drive the most conversions — or the most revenue. That's why comparing attribution methodologies is also important when evaluating the impact of engagement.

As Natalie explains: “What you might want to do is look at, ‘Okay, how many conversions am I getting with a first-click model on each of these channels? How many conversions am I getting with a last-touch model?’”

Significant differences between different attribution methodologies could indicate that current attribution modeling is misrepresenting the channel's true value.

If that channel has enough spend and enough strategic importance, you should consider running an incrementality or channel hold out test (still the gold standard for true causal impact). By evaluating comparative data, marketers can determine which channel investments drive the most conversions and narrow their focus to engaging consumers through those channels.

Encouraging Engagement After Conversion

Of course, engagement efforts can't just stop after conversions if marketers want to see long-term results.

“It's so easy to lose somebody right after purchase,” Stacey warns. “And they unsubscribe because they may think, ‘I don't need to hear from you anymore.’”

A well-designed welcome experience can make all the difference. The key is to provide relevant information, recommendations, and rewards to maintain engagement over an extended period rather than send a one-time message after a customer purchases or signs up. Spreading the messages out creates a sequence that feels like a conversation, which encourages customers to look forward to their next interaction with the brand.

“If somebody enjoys what they got from you, they're going to be interested when you have new things to show them,” Stacey explains. “I think people like timely interactions more than anything.”

Natalie took this approach with email campaigns during her time at Credit Karma. Because customers didn't typically use its products every day, the company had to pay particular attention to cadence when designing its engagement efforts.

“If you think ... how often are credit scores top of mind for most individuals, it's not a daily habit,” Natalie points out. Instead, people seek credit information for specific use cases like buying a new car or getting a mortgage. “And so one of the things with our email programs [that] we had been very thoughtful about [was] making sure we didn't oversaturate our customers in this ... channel,” Natalie recalls.

To accomplish the right cadence, the company used machine learning that leveraged data from existing channel metrics and created personalized campaigns based on historical engagement patterns. This helped them match each customer's tolerance for the number of emails they received — and uncovered opportunities to increase email frequency with customers who engaged more often.

“It ended up driving pretty substantial uplift in sitewide revenue as a result,” Natalie says, “just from sending certain users more offers more frequently.”

Improving The Outcomes of Engagement Campaigns

Experimental campaigns and engaging welcome sequences generate data that marketers can use to increase engagement and improve outcomes — if they have the tools to interpret it.

In her current role, Stacey leverages a comprehensive business intelligence platform to support detailed analysis and generate actionable reports.

She advises marketers to look for platforms that integrate with other reporting tools so it's easy to track and visualize key metrics from a single dashboard.



"These tools are great for building dashboards with metric-based tools to identify the input deliverables you're trying to measure," she says. "For us, it would be the watch hours [and] what kind of programs or genres are people watching and how many hours are they spending in our app and how do we increase that engagement? All of these things that we can measure on the back end help us to make decisions on the audience that we're going to target for our campaigns."

By unifying various points of first-party data, a robust tech stack gives marketers a complete

view of customers that encompasses customer demographics, behaviors, and interactions. Analyzing data in context makes it possible to personalize experiences on an individual level.

Natalie says that this approach is the essence of engagement. "Really, when we talk about personalization, it's delivering relevant and tailored experiences to customers so that they're more likely to retain and stick around." Such tailored experiences can also win back customers who churn and will continue to improve their future interactions with the brand.

Striking A Balance Between Acquisition And Engagement

Of course, acquisition still plays a role. Brands can't retain customers that they haven't first acquired, and churn happens even with the best engagement efforts.

But Natalie says that "all things being equal, you take **Company A and Company B: Company A** does acquisition better, **Company B** does retention better. I would always bet on **Company B.**"

WHY?

According to Forbes,
Company B has a

60%-70%

chance of selling to its existing customers
compared to a

5%-20%

chance of selling to a new prospect.⁶

31%

Furthermore, once a customer becomes a loyal shopper or user, they tend to spend 31% more than new customers.⁷



Marketers will know it's time to shift strategies from acquisition to engagement when:

- **Increased churn rates** indicate a need to improve the customer experience. "As your churn portfolio gets bigger, there's suddenly this realization of, 'Wow, we have this massive churn population,'" Natalie says. "We need to do something about that."
- **Decreased spend efficiency** on paid acquisition channels suggests a brand is getting close to reaching its total addressable market.

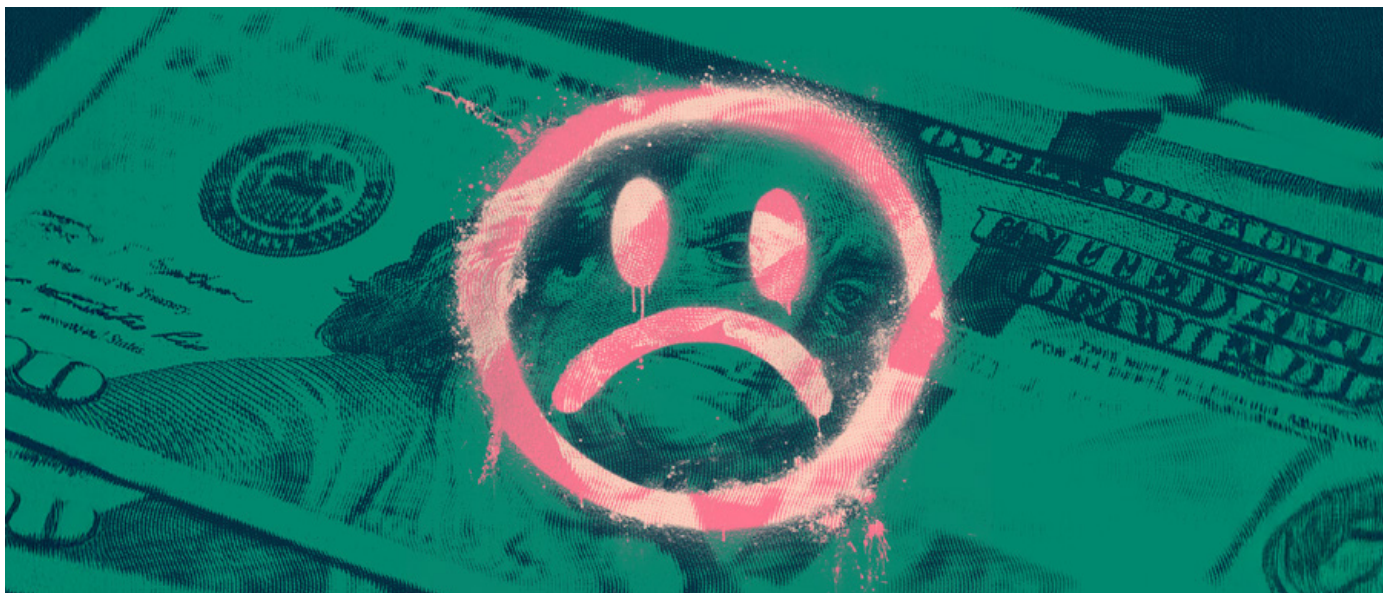
Stacey advises marketers to also keep in touch with churned customers as part of a larger strategy. "Re-acquisition [is] super important in the way of getting those customers who may have lapsed and pulling them back in. And that's usually done through an offer."

She points to her current company's successful Black Friday efforts as an example of re-acquisition in action. The company reaches out with special offers for customers who lapsed after a previous offer ran out and recaptures their business for another cycle.

If more U.S. companies included these types of re-acquisition efforts in their marketing, they could save some of the

\$136.8 BILLION

they lose annually to avoidable churn.⁸



As noted, balancing acquisition and retention effectively means marketers must continuously measure, refine, and optimize their engagement strategies to keep pace with shifting consumer behavior. However, legacy marketing technologies often undermine these efforts by leaving marketers stuck with outdated, siloed data and limited visibility into real-time customer actions.

The Problem With Legacy Martech

Legacy systems aren't built to detect and measure rapid shifts in consumer behavior or respond with engaging messaging. Data from these systems could be outdated by weeks, months, or even years by the time it's leveraged for a campaign.

That's because legacy tech captures data in silos that require a Herculean effort to connect and analyze. Marketers find themselves crushed under an ever-expanding tech stack as they attempt to make sense of customer interactions scattered between disparate systems.

The "manual processes" and "rigid technology" of these systems hinder personalization efforts for 31% of marketers, and 17.9% say they simply have "too many moving parts to keep track of."⁹

Being unable to trace data through the circuitous route of a legacy system leaves marketers with only lagging indicators like LTV and average revenue per unit or user (ARPU) to inform their decisions. But the consumer behaviors these metrics reflect at the time of measurement are so far in the past that they may as well have happened in the last ice age.



A Better Approach To Customer Engagement

Fortunately for marketers, modern platforms and technologies can free them from the landslide of SaaS bloat and accelerate tedious data analysis with tools that capture thousands of data points to reveal what consumers are doing, moment by moment, across every channel.

Tech innovations like predictive data analytics, integrated AI,¹⁰ and automated responses enable marketers to leverage real-time data and historical behavior patterns to deliver tailored brand messaging at scale.

This hyper-personalized approach creates the emotional connections today's customers want and encourages ongoing engagement.

How To Build A Business Case For Customer Engagement Technology

In light of the impact that engagement, retention, and re-acquisition can have on a company's bottom line, Stacey says having a modern customer engagement platform is a no-brainer.

In the event that a legacy system needs to be displaced, her experience has led her to believe that marketers should start small when building a business case for new tech, such as making a short-term commitment to a platform with the best potential to impact the company's North Star metric. To increase the likelihood of getting buy-in (which is something we'll discuss at length in **Chapter 4**), Natalie recommends supporting the case with industry benchmarks that clearly articulate the potential ROI of addressing the main challenges the company faces in its growth efforts.

“Frame the investment in the context of using engagement as building a competitive advantage.”

Data from previous engagement experiments strengthens the case for investment by showing how metrics from lower in the hierarchy connect to long-term value for the company. It also provides proof of concept to support spending on more extensive tools and campaigns with the potential to drive bigger results.

Since marketers need to thoughtfully build and optimize a modern Martech stack, in **Chapter 3**, we'll explore the technological capabilities required to support personalized, timely, and effective engagement campaigns.

“Just starting small and having a good pilot program can pave the way for a more company-wide rollout,” Natalie observes.

Key Takeaways

- Engagement is foundational to generating long-term value from consumers.
- Personalization — delivering timely, relevant messaging tailored to each consumer across channels — is essential for ongoing engagement.
- New technologies must replace (or at least co-exist with) legacy marketing systems in order for marketers to deliver personalized 1:1 interactions.
- Marketers need a centralized source of data to visualize consumer behavior and determine the best engagement strategies.
- Tracking small, day-to-day interactions provides more actionable data to inform engagement efforts than relying on lagging indicators.
- Experimental campaigns that demonstrate the value of engaging and retaining customers in the short term provide proof of concept for more extensive engagement efforts.
- Well-paced welcome sequences and strategic re-acquisition efforts can effectively reduce churn and increase long-term value from customers.
- Strategies like using mixed-media modeling (MMM) and comparing the results of different attribution methodologies can clarify which channels drive the most conversions and justify continued investment.

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Technology

Martech as the Precursor



“Your Martech stack is going to change. You’re going to have new requirements. You’re going to have new needs. You’re going to have new things you want to plug in. And the only problem is today you don’t know exactly what those things are going to be next year or the year after that. And so what you’re trying to do in designing the modern Martech stack is to make sure that the architecture and all the pieces that you’re bringing in are designed for change.”

**SCOTT
BRINKER**

VP of Platform Ecosystem at Hubspot,
editor of ChiefMartech.com,
the "Godfather of Martech"

“The funnel doesn’t work as well as it used to. If you start to think of your campaign experience as a playground, you start to focus on creating points in time in these experiences that are personalized, engaging, formative, beautiful.”

**TIFFANY
FITZGERALD**

Director, Strategy,
Media and Technology, Movable Ink

A flexible Martech stack is critical for effective engagement campaigns.



From collecting data to deploying timely messaging, Martech powers every action required to deliver customer experiences that get results.

Choosing the right tools to create those experiences — and keeping the tech stack updated as needs and capabilities change — is an ongoing challenge. And the rapid pace of tech development means that marketers must upskill and adapt to change faster than ever before.

Learning from experienced marketers like Scott Brinker and Tiffany Fitzgerald can help ease the overwhelming task of understanding how each new development affects campaign strategies.

Scott — often referred to as the “Godfather of Martech” — spends his days immersed in the Martech landscape. As VP of Platform Ecosystem at Hubspot and editor of ChiefMartech.com, he's constantly attentive to Martech developments and what they mean for marketers.

Tiffany Fitzgerald, Director, Strategy, Media and Technology for Movable Ink, a content personalization and AI decisioning platform, has 16 years of experience in digital and customer strategy across agency, consultancy, and brand sides. She focuses on helping marketers navigate change and get buy-in for investments in Martech.

The Evolution Of The Martech Stack

The **previous chapter** uncovered the limitations of legacy platforms in the modern marketing landscape.

To recap, marketers who rely on these legacy systems waste time struggling to wrangle a sprawling, disconnected mess of tools into something resembling a cohesive unit. As a result, they often miss significant opportunities for customer engagement.

Modern Tools For Modern Marketers

Today's marketers can escape the constraints of legacy systems and embrace tools designed to simplify personalized, cross-channel engagement.

To fully leverage Martech's potential, marketers need a well-structured tech stack consisting of foundational tools complemented by specialized add-ons that enhance effectiveness.

Foundational Tools

Foundational tools provide the essential basic functionalities required to execute effective campaigns. These two platforms work together to help marketers visualize customer segments and act on critical insights:

- A **customer data platform (CDP)** that includes tools for capturing, managing, analyzing, and activating data — including unstructured data like emails, reviews, and social media posts.
- A **customer engagement platform (CEP)** to power campaigns, enable personalization, and deliver messaging across push channels. A CEP can be used alone or alongside a CDP to create a flow of data that provides marketers with detailed insights.¹

Complementary Add-Ons

Additional tools enhance the basic Martech stack with capabilities that streamline deployment, support personalization, and improve the customer experience. These may include:

- **Digital experience platforms (DXP)** to ensure that customers receive consistent messaging and service across touchpoints.
- **Social media management** to simplify scheduling and posting across platforms and provide detailed performance insights.
- **Mobile marketing platforms** to optimize communications through SMS, push notifications, and in-app messaging.²
- **Voice-of-customer tools** to collect real-time customer feedback and enable proactive responses.

One thing to note is that marketers may feel pressured to select tools that promise comprehensive solutions. However, Tiffany suggests that integrating targeted, smaller applications with your foundational stack can yield better results.

"Sometimes smaller applications are the answer to creating a bespoke tech solution that works for your organization and team," she explains.

“You can start with larger tools that get a lot done, but be open to bolting on smaller applications that do exactly what your team needs to have a creative and innovative edge.”

/Tiffany Fitzgerald

Director, Strategy, Media and Technology,
Movable Ink

Customer Engagement In An Evolving Landscape

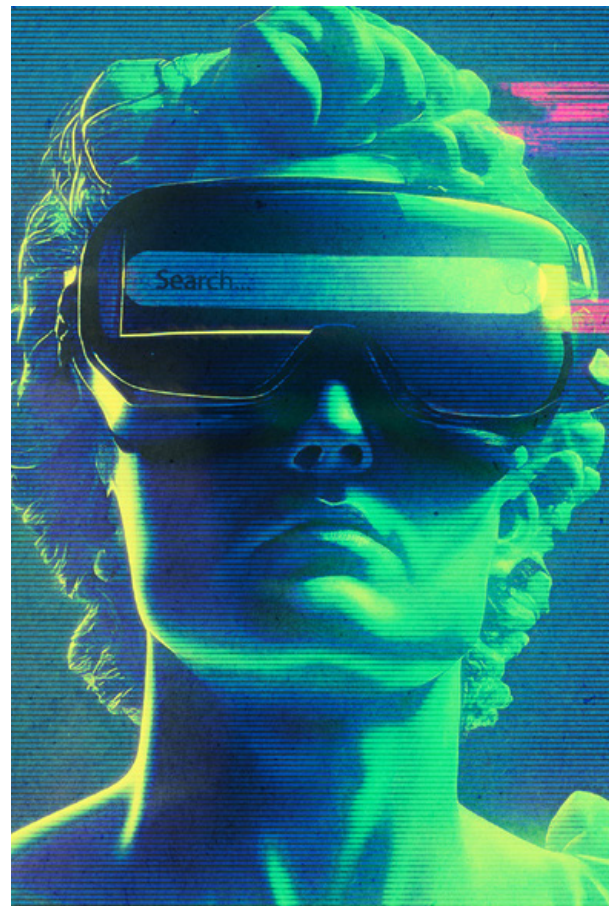
The tools in a Martech stack capture a constant stream of data from an ever-expanding ecosystem of touchpoints. Scott points to this massive increase in data as one of the major shifts driving the changes in Martech and engagement campaigns.

"I think there are two things that are really at the heart of driving these more advanced campaigns and programs that we're running," he says. "First of all, it's a heck of a lot more data. [And it's coming] from all these different marketing touchpoints."

New engagement channels, including AI chatbots and search engines, are the second big driver.

These channels have turned the traditional marketing funnel into a nonlinear journey that includes interactions as diverse as email, SMS, social media, video, and zero-click search summaries.

"The customer engagement campaign strategy has shifted because we've evolved to be a more complete digital omnichannel ecosystem," Tiffany explains. "[The] customer engagement journey stopped being thought of as a completely linear experience, and instead it's being thought of as a more fluid, individualized journey."



She points to an illustration given by Ashley Faus, Head of Lifecycle Marketing at Atlassian. Faus describes the evolving journey as a playground³ where customers jump from one platform or channel to another, go off in another direction to research or read reviews, and double back to explore new opportunities for engagement. Sometimes, customers cycle through phases more than once in an order that, on the surface, appears random.

The shift signals a move from a marketer-led to a customer-led experience. Instead of trying to push consumers down specific paths, marketers are now tasked with discovering how to meet them where they are and lead them to the next best step through targeted messaging.

"The funnel doesn't work as well as it used to," Tiffany says. "...[I]f you start to think of your campaign experience as a playground, you start to focus on creating points in time in these experiences that are personalized, engaging, formative, beautiful."

A robust Martech stack is critical to understanding and creating the playground experience. Modern technologies help translate millions of data points into insights and enable marketers to design, deploy, and iterate on engaging campaigns that impact key organizational KPIs.

The Role Of Data Strategy: Connecting Martech To Campaign Execution

But the journey from data to outcomes isn't easy. First, marketers must successfully capture data from every touchpoint. Then, every data point has to flow into a central platform (which we'll cover more deeply in **Chapter 6**), where all teams involved in the campaign can access insights through clear, actionable reports. Accurate reporting requires alignment on data taxonomy; otherwise, some insights inevitably fall through the cracks.

"There are so many touch points that customers have with us digitally that it's not unusual for a lot of companies to have gaps in visibility," Scott says. "There's also very often the challenge of alignment. We might tag things a certain way in this channel, and then we tag things differently in this other channel. And when we start to aggregate that data to try and get a more holistic view of customer behaviors and patterns, things don't always line up perfectly."

Once collection and classification are sorted out, marketers can interpret data in ways that align campaign strategies with consumer expectations and behaviors.

Tiffany recommends four methods for proper data interpretation and application:

- **Using Real-time Analytical Tools:** Use a customer insights tool to streamline analysis and support rapid iterations in response to real-time changes. "We all know what it's like to have to iterate on stale data that's six months or a year or even two years old," she says. "And at that point, everything, the whole world, has changed."
- **Reporting Through Data Visualization:** Leverage data visualization to present data points as graphics showing exactly what's happening in the customer journey. Tools with flexible dashboards enable marketers to create and share custom reports in tabular and visual formats that focus on data that's relevant to stakeholders' goals.
- **Leveraging AI:** Take advantage of large language models (LLMs) and deep learning integrations to query data and get straightforward, understandable answers to complex questions. These AI tools can uncover critical insights at lightning speed and save marketers and data teams hours of time.
- **Combining Data and Storytelling:** Tell stories instead of sharing an endless stream of raw data points. As the **next chapter** will demonstrate, storytelling is a critical part of getting buy-in for new initiatives. Starting with a few operations-level actions, using data to demonstrate how the outcomes connect with business objectives, and sharing a detailed communications plan cuts through the noise to give stakeholders a clear idea of the potential ROI of investing in a new tool or campaign.

Customer engagement is a cross-functional effort.

Again, team alignment is essential. Essential touchpoints and data span the domains of multiple departments. Strong relationships between marketing, creative, and brand make it possible to transform this diverse data into a consistent, personalized experience across channels. And with the tech team on board, it's much easier to coordinate custom solutions or add-ons required to optimize campaign execution.

Building An Effective, Flexible Martech Stack

As alluded to in **previous chapters**, having the right tech is key to creating personalized cross-channel experiences that consistently improve ROI.

But what is the "right" tech in today's landscape? How can marketers sift through the thousands of available tools to find the combination that best supports their unique campaigns?

How To Evaluate Martech Tools

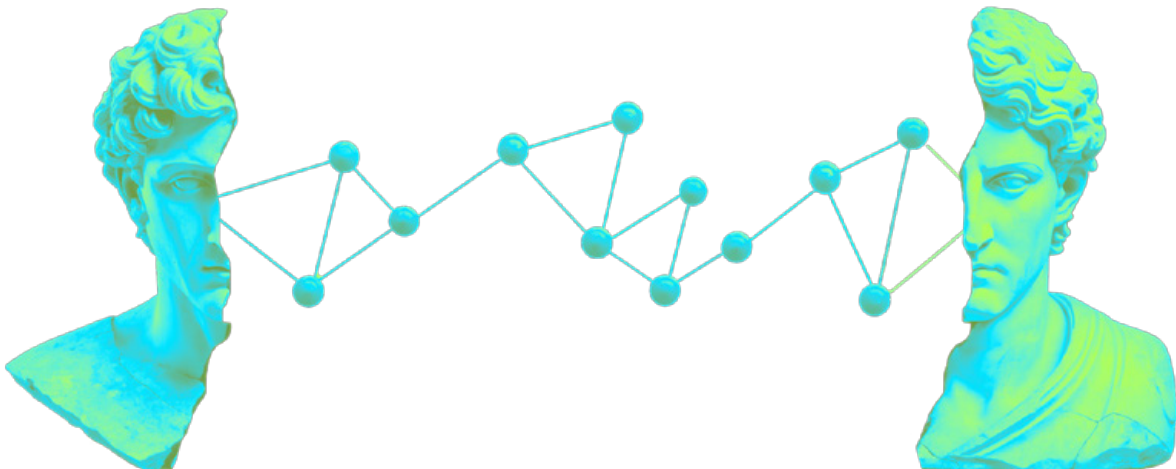
Creating a customer journey map that visualizes the capabilities necessary to support engagement across touchpoints is an essential step in the evaluation process. As circuitous as it has become, the journey remains foundational to understanding customers' challenges, questions, and needs.

"Mapping [the journey] out, even if it's a decision tree, is still useful to understand," Scott says. "As people come to us through different mechanisms or through different intents, what tends to be their process? What are the things that they're trying to overcome to make decisions as to whether or not we're the right product or service for them?"

He points out that data analysis can reveal key patterns in the actions and paths that bring various customer cohorts to specific points in the journey. "As you map that out," he says, "and you understand who those

audiences are and how they reach you and what they're looking for, that allows you to start to plan the sorts of capabilities [you] need to have to be able to deliver a terrific experience to each of those points."

Having this picture enables a design-first approach in choosing Martech tools.



Designing With An Eye For Flexibility

Regardless of current needs, flexibility must always be top of mind when designing a Martech stack. As noted in **Chapter 1**, customer behaviors and expectations have evolved dramatically in recent years, and the trend is set to continue in the face of unpredictable shifts in culture, society, and economic conditions. Making flexibility a priority ensures that marketers always have the best tools available to respond to these changes.

“You’re trying to make sure that the architecture and all the pieces that you’re bringing into [the stack] are designed for change,” Scott says.

It must be easy to add, remove, or replace tools as needed to optimize campaigns while being mindful of the critical interdependencies within the tech stack and the dependencies that new tools introduce.

Running Tests And Measuring Results

To understand the full picture of what capabilities will support continued adaptations and improvements, marketers should adopt the practice of continually testing existing tools, gathering data, and analyzing outcomes.

Ongoing tests create a visual of what the tech stack is doing and how effectively it executes engagement campaigns. The results allow marketers to document wins and identify growth opportunities that support the need for ongoing Martech investments. Careful analysis also reveals areas where engagement efforts fall short and new investments are needed to support future growth.

“Set up data and analytics, whatever’s required to know how much ROI you bring the organization from your Martech investments,” says Tiffany.

“Then make sure you’re really loud about what you achieve with your Martech stack. Clearly illustrate your wins, your learnings, and your growth opportunities to your executive leadership team. If you’re bringing them in and you’re saying, ‘Hey, we tested X approach and found it wasn’t as effective as Y,’ you show your team’s expertise. And then once you’ve tested and it is successful, really be loud about what you achieved. You want them to [say], ‘We’ve gotten a lot from your Martech investment this year. Of course you can have that budget — and maybe even more for the next year.’”

Investigating Integrations

Knowing whether a new tool or platform will integrate with existing systems and work well with tools that may be added in the future plays a key role in determining which tools to invest in.

"It's funny: on all these surveys for marketers over the years about Martech and what's either their biggest pain point or one of their biggest things that's important to them when buying technology, 'integrations' is almost always in the top three," Scott observes.

"It's like if it doesn't integrate, it doesn't matter."

He says integration capabilities should be one of the top three requirements marketers consider when evaluating new tech before introducing it to the stack.

Ultimately, integrations drive the success of engagement campaigns.

When data isn't shared effortlessly across channels and tools, execution suffers.

Automations may either malfunction or send incorrect messages. Marketers face delays while they rush to compile data manually. What initially appeared to be a wise investment can become a significant error.

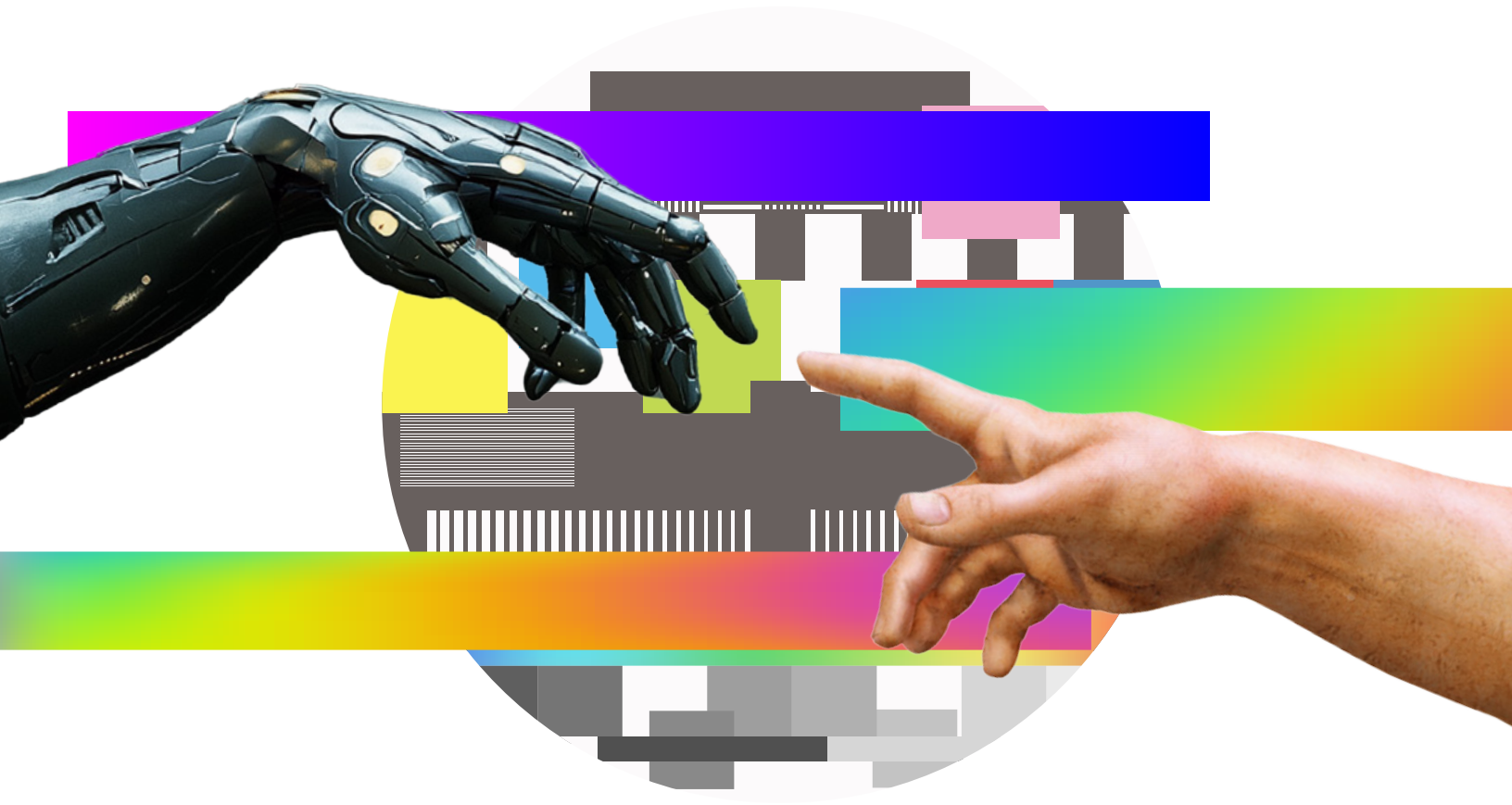
That's why Scott recommends getting a clearer picture of a tool's integration capabilities by asking:

- **What use cases are supported?**
- **Does the tool enable data sharing and seamless workflow automations between products?**
- **Will the tool's capabilities appear in the user interface of the platform it's integrating with?**
- **Does it support compliance with the data laws and regulations the company has to follow?**
- **What is the API capable of? How often is it updated?**

The answers to these questions are important not only to marketers but to other teams whose workflows may be affected by the integration. Getting alignment between departments and working with vendor partners to implement new solutions helps ensure the integrations run smoothly for everyone.

"Your vendor partners want you to succeed," Tiffany points out. "Often, they have relationships and partnerships with each other that you can benefit from. So you can definitely engage them in helping you integrate your Martech tools with what you already had existing with your systems and your workflows."

Skills And Enablement For Effective Martech Utilization



As systems evolve with the introduction of new tools and integrations, marketers must cultivate skills to leverage the full range of updated capabilities in order to execute impactful engagement campaigns.

Scott and Tiffany highlight four key areas to focus on, but before diving into their recommendations, it's important to address the elephant in the room: the growing influence of AI tools in marketing and engagement.

The Role Of AI

The swift development of new AI models, tools, and features has flooded Martech with integrations and add-ons that have the potential to simplify operations and revolutionize the creative process.

But it's important to keep the capabilities in perspective. Despite recent advances, AI has limitations and isn't sophisticated enough to run entire marketing campaigns.

"AI has in no way replaced the human mind," Tiffany assures marketers. "We still need creativity; we still need innovation."

Good marketing has always broken the mold. It's always subverted expectations."

WAYS MARKETERS CAN USE AI

Experimenting with a combination of human ingenuity and AI input can help marketers learn how to effectively leverage the advanced capabilities of new tools when designing innovative campaigns.

As A Brainstorming Partner

Generative AI tools that draw on LLMs can be potential partners in the creative process. Scott suggests using these tools' conversational design to solicit suggestions and uncover new ideas that could improve marketing campaigns.

"I can say this, having done this myself: It's actually surprising how powerful that sort of creative back-and-forth can go in ideation and sort of digging deeper into it," he says.

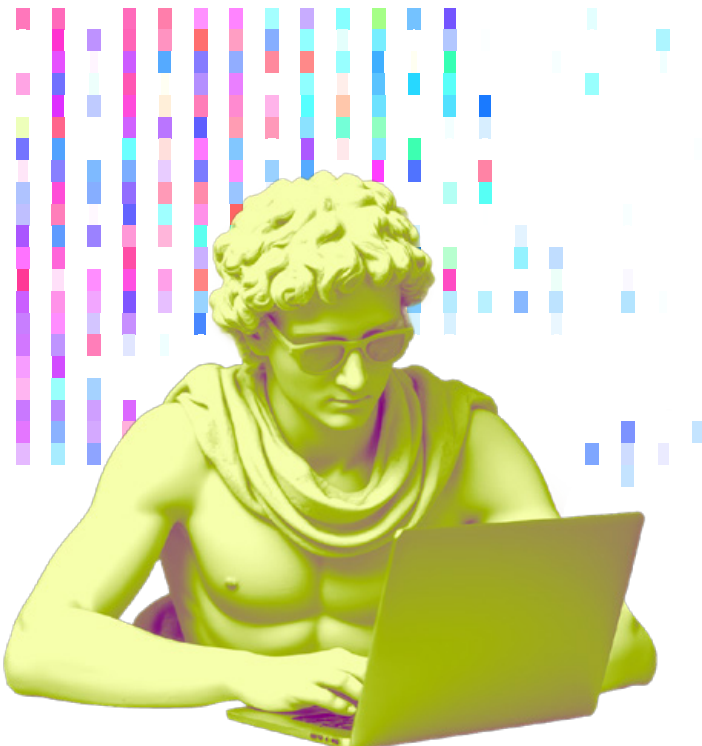


For Complex Analytics

Tiffany notes that human brains aren't particularly good at parsing through the vast quantities of data that flow through modern Martech stacks. From her perspective, it makes sense to offload these tasks onto AI to enable faster analytics and reporting. And because some tools are now able to look beyond historical patterns and predict future consumer behaviors, it's possible to proactively leverage data to design campaigns that take advantage of previously unforeseen opportunities.

Scott thinks that, in the future, AI may introduce even more nuances in such campaigns with sophisticated tools that can access and analyze a broader range of unstructured data types.

"So getting access to things like phone calls or emails or longer reviews that people wrote or things like that, and letting AI ... synthesize insights from that as well as the more quantitative data," he explains. "That will be able to help inform marketers as they bring new programs and campaigns online."



For Efficiency

AI can improve efficiency in areas beyond analytics. Generative AI in particular has come a long way in its ability to create prototype content from minimal manual input. With just a few clicks or a well-engineered prompt, marketers can now transform data into engaging experiences in a matter of minutes.

The speed at which these tools can generate new messaging and creative gives marketers more opportunities to test and optimize campaigns in real time. This continual adaptation helps reduce errors, ensure relevance, and improve effectiveness at scale.



Combined With Human Creativity

But even with rapid advances in AI, marketers still need to develop and maintain a solid understanding of the campaigns they're running, what's working or missing, and the outcomes they're trying to achieve. AI can speed up iteration and testing, but human marketers still need to make tweaks, measure the results, and decide which actions to take next.

"This is where the marketer is still the driver of the strategy," Scott says. "Ultimately, what insights do they consider to be valuable?"

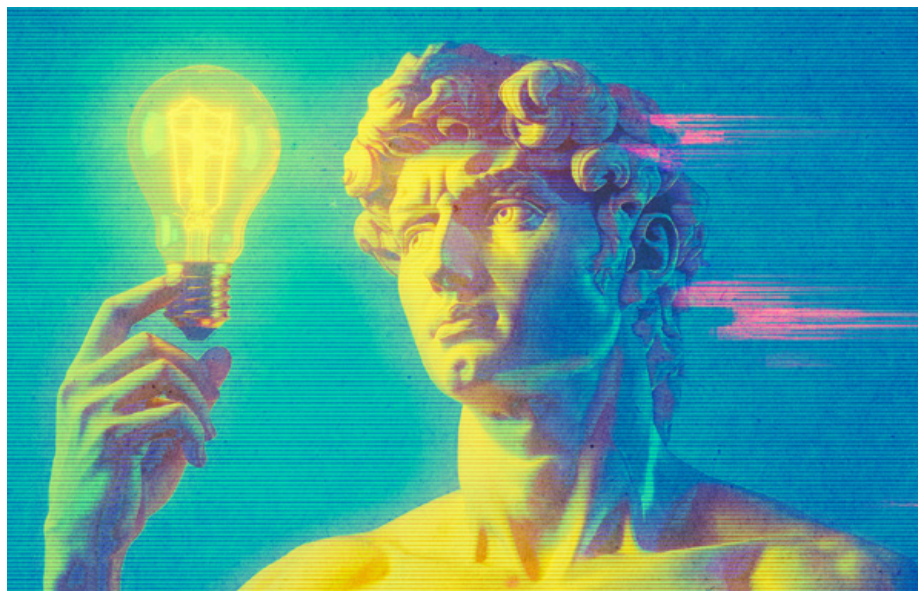
The same goes for applying predictive analytics. As Tiffany advises, "Make sure you're still leveraging yourself, your team, your workshops, your brainstorming to come up with the higher level creative, innovative approaches to how you market, what you're saying, and what channels [you're using]." These human interactions are ultimately what drive real breakthroughs in marketing.

Four Key Skills For Marketing Innovation

Layering AI on top of timeless, foundational skills equips marketers to reach those breakthroughs and create effective campaigns that keep customers engaged no matter where they travel on the playground.

To support continual innovation, marketers should focus on:

- **Technological skills**, including a programmatic approach to design that breaks the customer journey down into various components and evaluates the overall flow to understand the underlying tech capabilities required to support each step.
- **Data skills**, which can be as simple as knowing how to explore and interpret data in ways that support timely actions. "You don't have to be a data engineer, you don't have to be a data scientist," Scott says, "but [get] more and more comfortable spelunking with this data because the tools now make it easier than ever to get access to [it and] ask questions of it."
- **Strategic skills**, including an understanding of how each omnichannel strategy supports campaign outcomes and how to monitor customer interactions to determine the best messaging for each channel.
- **Creative skills**, which are rooted in an understanding of new tools that leverage emerging technologies to, as Scott describes it, "create more ambitious content, more ambitious experiences, to be able to do it faster, cheaper."



How today's marketers can upskill effectively

33%

Unfortunately, most marketers aren't taking full advantage of Martech's enormous potential. According to a 2023 Gartner poll, marketing leaders were only utilizing 33% of the capabilities available in their Martech stacks — a sharp drop from 42% in 2022 and 58% in 2020.⁴

Complexity and sprawl were among the top reasons behind decreased utilization. When companies bring new tools into the tech stack without a clear plan for implementation and training, marketers don't get the chance to explore the full range of capabilities. Ignorant of the power at their fingertips, they seek additional tools to handle tasks that the existing stack could already manage. The ongoing cycle eventually leads to sprawl that strains budgets and undermines efficiency.

Upskilling is the marketer's secret weapon for overcoming this dual challenge. By staying on top of innovations across the Martech landscape, marketers get a clear understanding of what tools are available and how best to leverage them for optimal engagement.

Because of the sheer number of platforms, capabilities, and skills required to stay current, Scott advises approaching the upskilling process with a mindset of continual learning.

“It’s an infinite challenge,” he says. “This is one of these things where none of us ever again in our lifetime will ever be done learning whatever we’ve learned today. There’s something new that’s just on the horizon we’re gonna have to look at tomorrow.”

The effort to support continual learning goes beyond individual marketers. It's time for more companies to start investing in enablement programs that provide marketers with ongoing opportunities for learning and development.

When marketers have access to money to test and experiment with new tools, they get hands-on experience that provides a clear understanding of how evolving Martech capabilities can fit into existing tech stacks. Also, peer-to-peer learning networks allow the free exchange of this knowledge between team members, which drives further innovation through collective brainstorming.

Marketing leaders can consider supplementing the resources available through marketing enablement programs with a combination of relevant podcasts, free courses from vendor partners, and a network of influential marketers from across industries.

"This is a great opportunity to see how [colleagues are] thinking about things across verticals globally and keep abreast of how they're using technological advancements and evolving consumer expectations," Tiffany says.

And, of course, colleagues at every level of their careers always have something valuable to share. "Remember that you should be learning from those who are working under you on your team as well as above you."

“You have fresh folks coming in, sometimes people who are straight out of college. You’ll gain a lot of new perspectives and ideas from them.”

Marketers who are willing to keep learning and adapting will stand at the forefront as tech and consumers continue to evolve.

But simply learning to design and utilize a tech stack isn't enough. To get buy-in for the tools that enable higher-stakes initiatives, marketers must learn to make tech part of a larger, more compelling story that demonstrates the impact of targeted engagement campaigns.

Stories have far more influence on stakeholders than lists of raw data points. Being able to clearly show how specific customer actions lead to meaningful outcomes gives marketers credibility that commands attention — and gets results.

Key Takeaways

- Martech is the essential backbone of effective consumer engagement campaigns.
- Facilitating the modern customer journey requires a design-first approach to building a Martech stack that considers flexibility, integration capabilities, and data strategy requirements.
- Continual testing reveals opportunities to expand the Martech stack with tools that enable more effective engagement and take advantage of opportunities for growth.
- Analyzing and applying data in ways that align with consumer expectations requires an approach that combines consumer insights tools, data visualization, and storytelling to translate raw numbers into actionable results.
- AI tools can help marketers brainstorm, simplify complex data analytics tasks, and improve efficiency, but human insight and creativity are still critical to designing innovative campaigns.
- A combination of marketing enablement and proactive upskilling can help marketers familiarize themselves with new Martech tools and leverage the full power of their tech stacks.

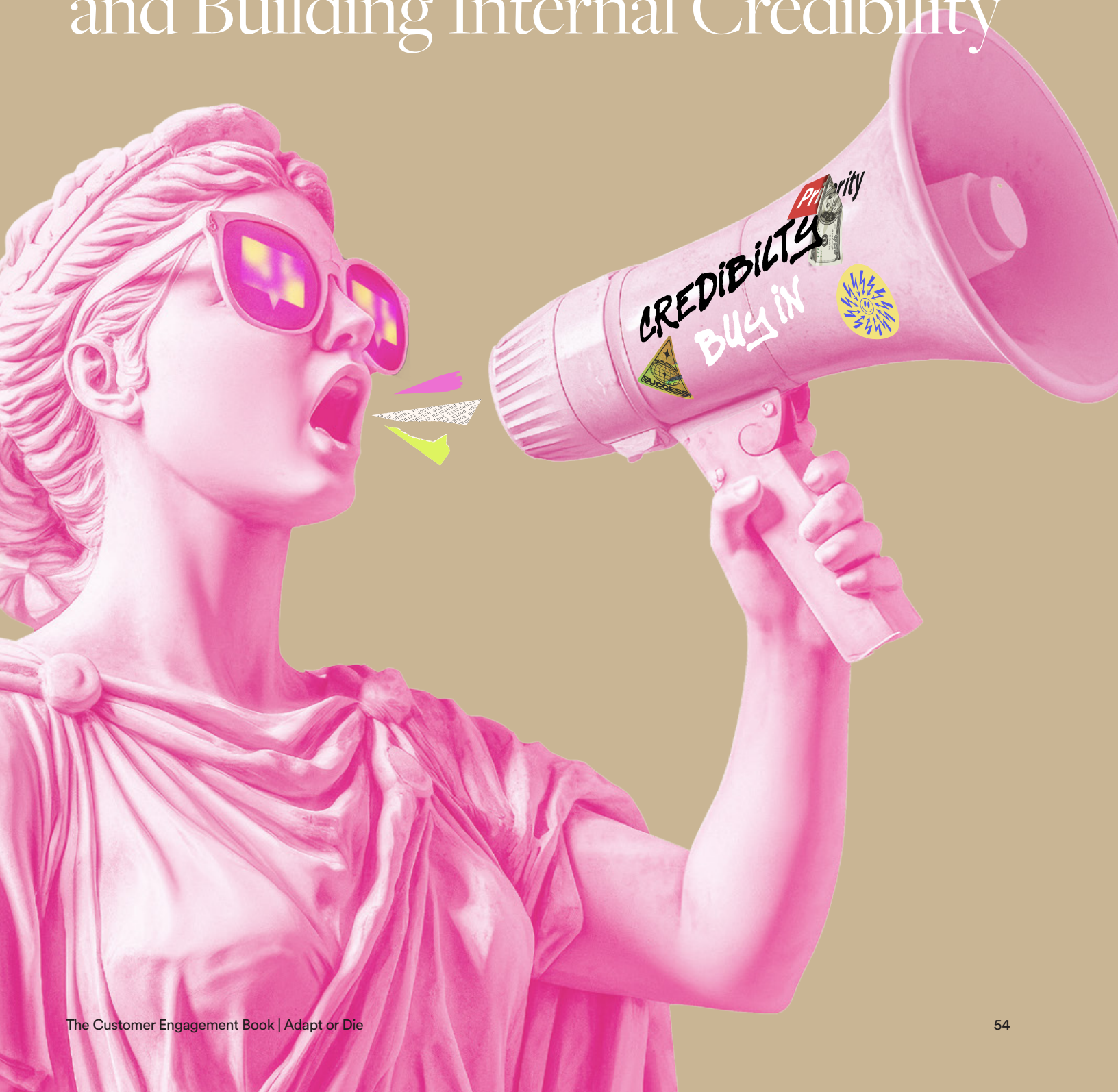
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Influence

and Building Internal Credibility

CHAPTER FOUR



“To get leadership buy-in, you need to tell a story that matters to them. Link to the details but sell the big picture. Once prioritized, turn to the cross-functional teams to build collective goals and get them to work together. ... Once you get leadership to understand why what you’re doing matters ... you’ve broken through, you’re creating big things, and that’s when the really good stuff happens.”

ANGELA RUEDA

Director of Business Marketing
Technology, Meta

“There’s an art to knowing your audience and tailoring that pitch, just like you would for external prospects. Chat with all your stakeholders and make sure you understand what their OKRs/KPIs are so you can tailor your pitch to show how the impact will ladder up to the metrics they need to improve.”

PHIL GAMACHE

Co-Founder, Humans of Martech

Credibility is everything



when it comes to
getting buy-in for
marketing initiatives.

Nobody listens to a marketer who can't prove they know what they're doing and can't get impactful results.

Stakeholders need to see how a campaign or tool will directly impact the metrics and outcomes they care about. They need to understand how making incremental optimizations, encouraging small actions of engagement, and driving retention can solve the company's most pressing problems.

It's up to marketers to tell those stories with clarity and competence.

The Buy-In Struggle Is Real

Getting stakeholders on board is an uphill battle. Marketers face obstacles at every turn, including:

- Stakeholders from other teams or departments who fail to see how marketing efforts support their goals
- A lack of alignment among stakeholders¹ with competing priorities
- Resistance or hesitation due to past campaigns that failed to perform as expected²
- Competition for limited budgets already stretched across departments
- The struggle to connect data to outcomes in a way that addresses the interests of all stakeholders³

Meeting these challenges comes down to the simple (but difficult) task of crafting stories that walk stakeholders through exactly how a marketing investment benefits the company as a whole — and show what kind of ROI they can expect if they support it. That's where credibility comes in.

Expertise, insight, and previous successes bolster a marketer's case for further investments and increase the likelihood of getting a buy-in.

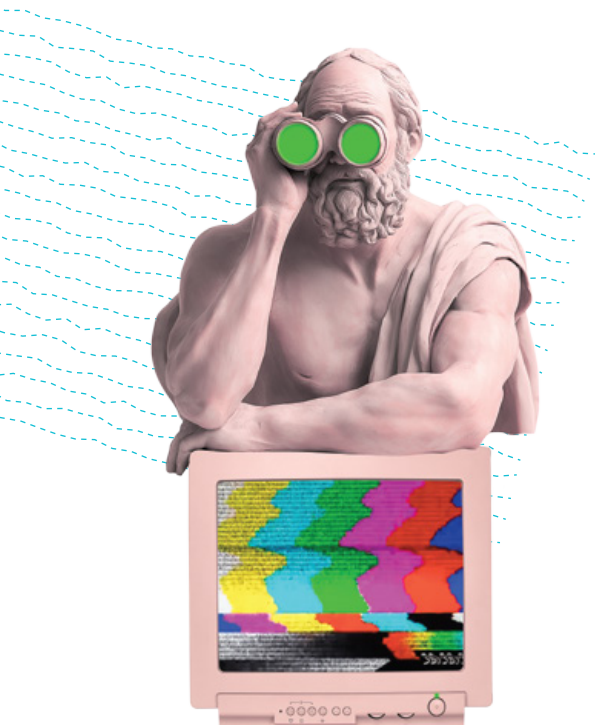


Establishing Credibility As A Marketer

Angela Rueda and Phil Gamache have navigated the process of building credibility throughout their lengthy marketing careers and successfully used their expertise to design, pitch, and launch impactful marketing projects.

As the current Director of Business Marketing Technology at Meta and former Director of Marketing Capabilities at Citibank, Angela has spent over a decade working on initiatives that support engagement and drive results.

Phil applies his 13 years of marketing and growth experience to his work as a Martech and growth advisor. He's spent his career experimenting with growth strategies and leading marketing operations and lifecycle at big names like [WordPress.com](https://www.wordpress.com) and startups like [Close.com](https://www.close.com) and now serves as co-founder of the popular Humans of Martech podcast, where he helps marketers successfully navigate the constantly expanding universe of Martech tools.



Start Small And Build Up

The foundation of their success? *Small steps.*

That means focusing on "doing the work, keeping your head down, showing the results (good and bad), and communicating that to multiple different stakeholders," Phil says.

"I did a lot of unsexy things that many team members didn't want to do. Like fixing URL parameters, standardizing campaign naming conventions, and building proper tracking documentation."

He spent his early years in marketing doing little projects and making "tiny optimizations" that could generate measurable results in days instead of months or years. These small-scale initiatives demonstrated his capability and opened the door to getting support for bigger changes.

Angela began her career hyper-focused on execution. She learned to increase the complexity of her initiatives over time by experimenting with cross-functional projects and different layers of technology. Once she began to see "very tangible wins," she was able to show solid evidence of the impact technology has when brought to life through powerful omnichannel marketing strategies.

As demonstrated in Chapter 2, this is exactly the kind of evidence marketers need to prove the ROI of their initiatives. And the more tangible wins a marketer can show, the more credible their work becomes in the eyes of stakeholders.

Cultivate Strategic Relationships

Small steps and incremental execution have more impact when marketers understand how their efforts fit into the broader efforts of the company as a whole. To gain that understanding — and lay the foundation for alignment — Phil took the time to make friends with people from key teams across the companies he worked for.

"I like spending time getting to know the day-to-day pains of other departments that compete with my priorities, and [I] try to identify overlaps where we could both benefit from something I'm pitching," he says. When marketers know where their colleagues are struggling, it's easier to demonstrate how even small wins in relevant marketing initiatives can help everyone reach their goals.

Building relationships also fosters unity between departments, which is critical to breaking down silos and creating shared visions for cross-company efforts. Strong relationships encourage the mindset of looking at the company as a corporate "ecosystem" focused on common goals instead of isolated teams competing for buy-in on conflicting priorities.

"This is another challenge: building collective goals across teams that don't usually have collective goals," Angela notes. "To get leadership, you need to tell a story that matters to them. Once prioritized, build collective goals for teams that usually have siloed goals and get them to work together and to let go of the ownership of their tools and think about an ecosystem."

Supportive alliances across departments foster cooperation that can benefit everyone involved. "You want to create a shared vision that everyone feels ownership of," says Phil. When everyone is personally invested in a campaign's success, the potential impact is much bigger, and the case for buy-in is stronger.

Know The Industry

Internal alliances are valuable, but marketers must also step out of their in-house bubbles and become well-versed in their organization's industry. As noted in Chapter 3, that means taking advantage of opportunities to learn from other credible marketers, relevant podcasts, and free courses.

Industry knowledge gained from these resources is critical to building credibility because it enables marketers to:

- Bring fresh ideas that push the envelope, challenge the status quo, and drive results
- Leverage third-party components and tools to support efficient product development
- Remain relevant in their roles as technology and consumer behavior continue to change
- Build thought leadership based on the diverse perspectives of other marketers
- Benchmark current approaches with industry standards and best practices

But, Phil cautions, "Industry knowledge should inform your decisions, not make them for you."



Real credibility stems from learning to consider different opinions and apply the best insights to solve problems rather than simply following what competitors are doing.

The Road To Buy-In: Tips And Frameworks

Armed with industry knowledge, strategic alliances, and proof of past success, marketers have a solid foundation on which to build business cases for their projects. The next step is to get clear on what initiatives to pitch — and how to frame the ask as a compelling story that motivates stakeholders to say yes.

Cultivate Strategic Relationships

When evaluating which initiative or tech investment to pitch first, Phil uses the "impact, alignment, lift" framework:

● Impact

identifies "current measurable pain points and inefficiencies" that need to be addressed.

● Alignment

places the initiative within "broader company goals."

● Lift

considers the resources required to implement the initiative, "including team time, technical resources, and organizational change management."

Priority initiatives have the greatest potential to solve problems and improve business outcomes while using the least amount of resources. Focusing on these products enables marketers to continue building credibility through successful execution so they can begin to justify asking stakeholders to invest in more ambitious projects.

Identify Stakeholders (And... Coffee?)



Whether foundational or ambitious, ideas need to get in front of stakeholders who will care enough to support them. Organizational mapping helps pinpoint leaders from across the company whose involvement is essential to the success of a proposed initiative.

Targeting teams involved in the company's go-to-market strategy — including content, data, and product — is key. "Make sure that you have representatives across all of those steps in the [go-to market] process so that you don't run into barriers later on," Angela advises.

Phil uses the "coffee test" to identify stakeholders whose connection to a project may be less obvious.

"Mapping out the decision chain is part of it, but the next step is figuring out who each person in that chain goes to for coffee chats before making decisions," he explains. For example, "your CMO might be really tight with a senior product manager and run a lot of decisions by them because they fit the company's ICP."

He also suggests seeking out

"the people who've been at the company the longest. Those tenured folks often have hidden influence networks or secrets about processes or insider info that [isn't] obvious on any org chart."

Connect Marketing Goals To Business Goals

Ultimately, though, senior leaders care most about how a proposed initiative will make money for the company. Pilot programs⁴ can provide proof of concept by demonstrating how a new feature, capability, or campaign can drive incremental revenue in the short term. The ROI data from pilots clarifies whether a larger rollout will bring enough reward to be worth the investment.

"To me, the pilot approach is one of the most important strategies to align the marketing goals with the broader business objectives," Angela says. "For strategic initiatives that are over a year-long, show an early win that delivers revenue — because revenue is the common language that we're speaking. And the moment that you're able to give that direct output ... you will have buy-in with results that you can deliver [on] early."

Software with analytics tracking provides the data that demonstrates the link between initiatives and revenue. Although that link may not be clear right away, careful planning and analysis enables marketers to track results that lead to impact, similar to the "hierarchy of metrics" mentioned in Chapter 2.

"Long-term impact implementations are really hard to measure," Phil points out. "Focus on showing a clear path to value and having enough early indicators to prove you're on the right track."

Use Data To Create Comprehensive Stories

Data, of course, plays a role in showing the business impact of a potential project, but metrics alone mean nothing to stakeholders without relevant context.

This is where storytelling makes the difference. Marketers can leverage Angela's idea of leading with customer-centric problems to craft miniature narratives that illustrate the meaning behind the metrics.

As Phil illustrates,
"Instead of saying,
'Our welcome email
has a 15% open rate,'
you could frame it as

'We're leaving \$500K on the table annually because 85% of new customers never see our core value proposition.'"

Continually tracking the key numbers that drive business outcomes gives marketers a clear understanding of how metrics correlate with real-world customer actions — and how those actions affect results. The data becomes a comprehensive story arc that reveals the impact of the entire customer journey.

"A lot of times, you don't want to look at these things in isolation," Angela says. "You really want to build a view of a funnel that tells a complete story."

Her experience taught her something powerful: successful marketers pull relevant data from across marketing, sales, and product teams into focused dashboards to build persuasive business cases. Using visual progress reports to simplify complex numbers creates compelling stories that showcase the journey toward successful outcomes.

Connect Data To Business Needs And Goals



Getting there doesn't have to be complicated. Phil's simple framework of "problem, impact, solution" translates marketing data into a short narrative that leads stakeholders through what it would look like to implement a proposed initiative.

To show how this works, he gives the example of pitching a new customer engagement platform:

Lead with the problem: "We're wasting tons of hours manually sending broadcasts when 70% of these could be drip campaigns."

Show how the problem is impacting outcomes for the company: "Our team spends 25 hours per week on manual sends, and we're missing prime engagement windows for international customers."

Explain how the tool can solve the problem and improve outcomes: "This tool can automate these workflows and hit customers in their time zones, which has increased engagement by 40% at similar companies."

Backing up stories with data and illustrations from companies that have successfully implemented similar initiatives provides stakeholders with tangible evidence for the potential benefits of supporting a proposed campaign.

Young Marketers Can Build Influence And Trust

How well a marketer's stories are received comes back to credibility. Developing an ongoing practice of experimentation and execution gives marketers measurable outcomes to support their narratives and prove that they care about not only their ideas but also how those ideas benefit the company as a whole.

Before pitching, it can be helpful to connect with one or more sponsors within the company to talk through a concept. "Find some leader or trusted set of team members that can help validate your idea, help plug in additional detail that you might need, connect you to other people so that you really validate it before you are exposing it to others," Angela advises.

Phil suggests going straight to the target audience to clarify their needs.

“There’s an art to knowing your audience and tailoring that pitch, just like you would for external prospects,” he says. “Chat with all your stakeholders and make sure you understand what their OKRs/KPIs are so you can tailor your pitch to show how the impact will ladder up to the metrics they need to improve.”

For risky proposals, marketers should show their mitigation plans through concrete evidence from previous experiments. Phil reveals: “Experimentation is a secret weapon to proving the incremental impact of your ideas but also de-risking big bets.” Running small pilots reveals potential pitfalls and allows marketers to explain clearly how they’ll detect and respond to problems in future projects.

Both Angela and Phil emphasize that no marketer should overlook showing the power of an effective tech stack. Their teams create demonstrations that visualize how comprehensive tools track pilot data, proving concepts before full investment.

Angela’s presentations now feature interactive dashboards showing stakeholders exactly how each tool supports touchpoints that drive measurable improvements. Her success highlights how this approach strengthens business cases requiring significant tech investment.

And, not surprisingly, the connection comes across most clearly when presented in the form of a story.

“One of the things that has worked really, really well for me in multiple instances is showing the journey of the customer,” she says. “And one of the things specifically that works well for technology is I draw the customer experience, and behind it, I show what technology platform is powering that. ... I call out the technology that will power either the personalization or the channel or the data input that we’re using there.”



This creates “a customer journey that is very visual and shows the impact to the customer and how the backbone of technology supports it.”

Having that backbone is key to not only getting buy-in for initiatives but also planning and executing effective campaigns that deliver the promised results. Customer journeys continue to spread across an increasing number of touchpoints, and Martech is now indispensable in creating omnichannel experiences that drive results and translate into tangible ROI. The next chapter demonstrates how Martech enables the core elements of effective omnichannel campaigns through real-world examples from experienced marketers.

Key Takeaways

- Credibility is the essential foundation for gaining the influence and trust that supports compelling cases for new projects.
- Identifying stakeholders to target from across the organization and getting familiar with how new initiatives can connect with their goals removes some of the potential barriers to buy-in.
- Storytelling puts data in context to help stakeholders understand how marketing efforts and metrics address key problems and benefit the company as a whole.
- Gaining experience through small, impactful projects, cultivating strategic cross-functional relationships, and building a foundation of industry knowledge are key to building credibility.
- Pilot programs are essential for providing proof of concept that demonstrates how campaign metrics link to broader business objectives like revenue.
- Effective marketing stories lead with a problem, show how it's currently impacting outcomes, and introduce a proposed initiative as the solution.

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Strategy

For Successful
Omnichannel Campaigns



"In order to get the most reach and drive more conversions, we need to meet our clients where they are — which is ultimately across different channels."

**JENNIFER
FINN**

Senior Manager,
Lifecycle at Wealthsimple

"You need to work with what you have and put trust into the data and the tools you have at your disposal and make the most informed decisions that you can, but not let perfection hold you back from executing."

**ALEX
MAY**

Director of Strategy for Travel, Hospitality,
and Food Services at Movable Ink



Winning at omnichannel marketing isn't about chasing the latest channels.

It's about mastering the principles that make strategies work across any platform, any time.

The most effective marketers aren't just reacting to new engagement trends; they're orchestrating data, technology, and cross-functional collaboration to create seamless, high-impact customer experiences.

This chapter builds on the previous discussion about earning credibility and securing buy-in for new ideas. The most successful omnichannel strategies break down silos and create essential alignment across stakeholders — from product and legal teams to finance and data science. Getting buy-in early allows marketers to rapidly execute campaigns that don't just engage customers but also drive measurable business outcomes.

Yet, fast implementation in omnichannel marketing is easier said than done. As Chapter 1 explored, consumer behavior is constantly shifting, with new platforms emerging and others fading into irrelevance.



Navigating Shifting Engagement Channels

The way customers discover brands today is different from five years ago — and it will continue to change in the next five.

Social media channels have become powerful engagement drivers, yet their dominance varies by audience, region, and cultural moment. Consider the rapid rise of TikTok¹ as a product discovery platform,² the resurgence of Pinterest among Gen Z,³ or the increasing reliance on WhatsApp for brand interactions.⁴

As these and other channels wax and wane in popularity, former staples like email must now compete with app notifications, AI-driven messaging, and personalized content surfaces within digital experiences.

Goals And Challenges Of Omnichannel Strategies

In this changing landscape, a marketer's main challenge is creating a strategy that can flex and adapt — regardless of channel popularity.

The following case studies explore how leading brands have moved beyond engagement for engagement's sake to design omnichannel experiences that drive business.

As the stories unfold, five core patterns will emerge that define a winning omnichannel strategy:

Data-Led Decision Making

The most successful strategies aren't based on guesswork. Marketers analyze behavioral patterns, segment audiences intelligently, and use real-time insights to continually refine campaigns.

Stakeholder Alignment from the Start

Omnichannel execution involves product, finance, legal, creative, and operations teams. The best marketers know how to bring these voices together early so they can move faster later.

Personalization at Scale

Customers expect more than one-size-fits-all messaging. The most effective campaigns tailor content based on individual preferences, past behavior, and external triggers — even apparently small details like weather or economic conditions.

Experimentation and Adaptability

Change is the name of the game. What worked last quarter may not work this quarter. High-performing teams build in rapid testing, holdout groups, and iterative optimization to maximize impact.

A Relentless Focus on Business Outcomes

Engagement metrics don't pay the bills — customer acquisition, retention, and revenue growth do. The best campaigns prove their value by demonstrating alignment with key business objectives.

These case studies highlight how each principle comes to life in action as top brands navigate complex challenges, balance scrappy execution with long-term impact, and deliver measurable business results.

Effective Omnichannel Strategies In Practice

Successfully leveraging a Martech stack to deliver these tailored messages is the key to effective omnichannel marketing. But it's one thing to understand the technical aspects and quite another to put them into practice in ways that drive ROI.

This chapter will highlight two unique case studies of effective omnichannel campaigns in action and showcase the decision-making that ultimately made the strategies successful.

Alex May: Increasing Order Frequency Through Targeted Engagement

Alex May, Director of Strategy for Travel, Hospitality, and Food Services at Movable Ink, has worked with leading brands in the travel, hospitality, Quick-Service Restaurant (QSR), and retail industries to leverage cross-channel journey mapping for personalized campaigns that encourage customer loyalty.

Alex recalls the case of a food service business looking to grow customer engagement without cutting into its margins with discounts.

"We had a client who was looking to grow their engagement with some of their less-engaged customer base, and they wanted to do so in a way that drove orders without having to require a monetary type of discount," he recalls. "And so we took a look at some of their customer purchase behavior and customer lifetime value behavior to analyze [who were] the right folks who have an opportunity to grow some of their frequency."



Frequency is a big issue for food service companies in general, particularly as economic factors like inflation continue to impact discretionary spending. To meet the challenge, Movable Ink focused on targeting less-engaged customers and developing an offer to encourage re-engagement.

Setting The Stage

Not surprisingly, the effort started with a close look at customer data.

"We always want to take a very data-driven approach to these strategies," Alex explains. "So we wanted to dive deep into their insights around not only what is a group of less engaged customers, but dive a few layers deep to understand, what are their preferences, what channels do they engage with, ... what is their frequency score?"

Fortunately, the client had strong data on customer lifetime value (CLV), which helped Alex understand the current value of each customer and predict what their future value would be if they ordered more often.

Strategy And Ideation

By combining CLV numbers with purchase behavior data, the team discovered a subset of customers with the most significant opportunity for growth.

However, channel availability was limited for this particular brand, which meant they only had a few avenues that Movable Ink could use to take advantage of those opportunities.

"The client didn't have as much exposure to in-app messaging ... screen takeover[s], things like that. So we looked at what channels we did have exposure to," Alex explains, which in this case was a combination of email and rich push notifications. "And then in terms of targeting, [we used] customer behavioral data to determine when and how to target each customer."

To answer the "how," his team turned to market research. Their analysis revealed an intriguing pattern: delivery demand went up in bad weather. That meant they had a good chance of engaging customers with well-timed messaging based on local weather conditions and past purchase behavior.

"We delivered a campaign for customers who [were] in an area that was experiencing inclement weather to display their preferred products that they've ordered in the past and pair that up with the weather, temperature, and precipitation," Alex explains. "So when we deployed the email campaign in pair with rich push, we displayed that module encouraging folks to order their favorites and get it delivered."

Execution And Collaboration



Measuring the results was a joint effort. The client tracked campaign performance, and Movable Ink used the findings to test, iterate, and optimize the messaging.

A/B tests were a central part of the process. Alex discovered that the appearance of the creative had the biggest impact on engagement, so that's where his team focused their optimization efforts.

"We were able to A/B test how we were displaying the weather and where," he said. "So our first attempt was more text-based in terms of displaying the temperature and the precipitation. And what we found is, image or icon-based creatives performed the best."

Ensuring successful design and execution throughout the campaign required Movable Ink to work closely with several client stakeholders, including:

- **Channel marketers** to deploy messaging across advertising and engagement platforms
- **The products implementation team** to ensure that all the tech components were properly integrated
- **The analytics team** to gather data and understand campaign results

Alex and the team used clear, shareable reports to get alignment between stakeholders from the start. The reports included the details of the problem, the campaign goal, and the data required. Visualizations showed why Movable Ink was taking the approach of weather-based targeting and how they were going to measure success so everyone understood how the campaign would work. A central point of contact on the client's side served as a go-between to simplify communication.

Their approach clearly demonstrates how the storytelling strategies outlined in Chapter 4 work to secure buy-in from diverse stakeholders. Instead of leading with metrics about order frequency and weather patterns, Alex's team presented the campaign as a narrative with a clear arc that showed how their efforts would help the client reach their goal.

Overcoming Challenges

But communication wasn't always smooth.

"We obviously put together a process that works very well, but ... having a lot of cooks in the kitchen can make things a little difficult," Alex says. Staying in alignment required clear communication about goals and the specific role each team was to play in campaign execution.

Attribution presented another obstacle, but Alex and his team were able to leverage the client's CDP and data analytics capabilities to identify opportunities for iteration on each channel as the frequency of campaign messaging increased.

Their tests revealed that certain order suggestions got more engagement depending on the type of bad weather in a customer's location. "It could be the difference of showing a soup if the weather was cold but raining. It could have been a salad if it was hot and raining," Alex explains. "So, regionalization and the given temperature of that specific location played a role in us testing what different products would make the most sense at the given time."

Results And Learnings

Through the diligent combination of testing, iterating, and watching for nuances in customer behavior, Alex and his team got the results that the client was hoping for.

Using the holdout group as a baseline, Movable Ink analyzed engagement metrics like email CTR, push open rates, and conversations and saw a measurable lift across all three. The targeting technique was successful enough that the food service brand continues to use it to drive order frequency.

"That campaign actually drove a huge lift in engagement compared to the control group that we included ... who did not receive any weather-related targeting. It really proved out that the value prop of getting your food delivered was just as, or even more, valuable to customers than a monetary discount."

Jennifer Finn: A Bold, Scrappy Approach To Targeting New Clients

Sometimes a rising trend spurs marketers to act and put together a scrappy marketing campaign on tight deadlines to capture the moment before it passes.

That was Jennifer Finn's experience with a cryptocurrency campaign at Wealthsimple, one of Canada's most trusted money management platforms. The company offers a full suite of simple, sophisticated financial products across managed investing, do-it-yourself trading, cryptocurrency, tax filing, spending, and saving.

Jennifer's tenured experience with omnichannel strategy and execution comes into play in her current role as Senior Manager of Lifecycle Marketing. She helps the team develop effective engagement campaigns across Wealthsimple's portfolio of products — even in markets as unpredictable as crypto.

Setting The Stage

Studying behavior patterns among Wealthsimple's clients revealed long, seasonal crypto investment cycles and occasional organic engagement spikes. When Bitcoin gained momentum during the campaign, Jennifer and the team sought to harness these behaviors to maximize engagement.

Strategy And Ideation

With these clear objectives in mind, Jennifer and her team set to work identifying the right customer segments to target. The company serves more than three million Canadians across all of its products, a broad audience that encompasses all Canadians interested in investing and saving, so careful data analysis was critical.

An analysis of responses from previous marketing experiments provided several insights. First, it revealed client cohorts who positively responded to crypto-related messaging. Then, it helped Jennifer establish which channel combinations had the potential to make the most impact.

"Channel selection for every campaign follows a similar, simple decision matrix to help maximize reach and conversions," she explains. "Ultimately, [we want to] avoid repeating the same channel type in the same way for the same segment of users."

To narrow down the choices, the Wealthsimple team runs through a series of questions:

- **Is it urgent?**
If yes, prioritize more disruptive channels like app screen takeovers and push notifications.
- **Is the target audience active in-app?**
If not, use channels like email and push to get them into the app. Otherwise, utilize in-app surfaces to reach the most active clients.
- **How complex is the message?**
Simple messages are better for concise touchpoints like web or in-app marketing cards. Email provides more surface area to flesh out potential FAQs.

Overall, the company's campaign design is a process of "leveraging [data] to ... build a playbook when speaking to that particular segment of clients, [and] referencing the previous experimentation, performance, and analysis that we'd done for past campaigns."

Execution And Collaboration

To plan, build, and ship the campaign on tight deadlines, Jennifer and her team had to get all hands on deck right from the start. Fortunately, Wealthsimple has access to a range of "great minds" inside and outside the company.

"As a company, we've grown quickly, and we've attracted some really incredible experts in their own fields and functions," Jennifer says. "And so there's a lot of passion and knowledge in the room when we start to see opportunity like this build."

The shared passion made it possible for teams like product, lifecycle, growth, social, legal, and regulatory operations to collaborate on turning client and market data into a lifecycle brief on short notice. Starting with the KPIs of referrals, account openings, and net crypto deposits, the teams identified the best combination of channels and messaging to point clients to the next step in the giveaway at each touchpoint. Then, it was off to creative and legal for development and review before the official launch.



Experimentation was built into this cross-functional effort from the start to leverage new points of interaction recently launched in Wealthsimple's app. This offered the opportunity to test hypotheses like using the notification center, a more passive channel, to display crypto messaging to clients who were historically less engaged with the product and compare the results with a holdout group to determine the impact on account openings.

The multiple steps from analysis to launch offered plenty of opportunities for delays. A combination of tools and communication was critical to pulling the campaign off before crypto's market moment passed. Prior to designing the campaign, Jennifer and her team identified every collaboration required to ensure accurate product messaging, prevent legal complications, and prepare Wealthsimple's marketing channels for the increased volume they expected the giveaway to generate.

"It's truly a team effort across marketing and product. [It touches] creative copy, lifecycle, product marketing, user acquisition, brand, [and more,]" Jennifer says. "And then working with our product leads to make sure that we're talking about the product accurately, legal RegOps and finance to make sure that we can pay out when it comes time to wrap up the contest. And, of course, our [engineering] teams supporting to make sure they can handle the volume that we will hopefully be driving."



Wealthsimple's teams are used to bringing their diverse viewpoints together through platforms like Slack to brainstorm and plan, so asynchronous communication was central to the process. Using Slack removes the barriers that can arise when trying to coordinate in-person meetings so everyone can stay informed about the nature of the campaign and the timelines as a project progresses.

"At Wealthsimple, there's generally this expectation to debate and then ultimately commit," Jennifer explains. "It's a process that allows for all perspectives really early on, [and] results in really clear next steps."

Along with a communication platform, Wealthsimple's Martech stack includes several components that support swift campaign execution:

- A CRM to identify target segments from client lifecycle data, speed up the quality assurance (QA) process, and automate the campaign
- Creative tools to design omnichannel media and messaging
- Data analytics with visualization to provide real-time performance evaluation across channels and inform any necessary changes
- Additional platforms to power engagement and user acquisition through channels like social media and paid ads

Solid integrations between the tools keep the data flowing so the team can consistently monitor how experiments perform and respond with iterations the moment they notice something isn't working. "This is where we might see that an experiment is performing poorly," Jennifer explains. "We might have to quickly pivot, shift, or [make] slight channel updates based on client feedback."

Overcoming Challenges

Messaging was one place where they could have gotten stuck.

Phrasing and coordinating cross-channel messages was a particular concern in the crypto campaign, in part because clients in the target audience weren't all using the same version of Wealthsimple's app. The experience still had to be consistent for everyone, regardless of whether or not they had applied the most recent system update.

In addition to the app experience, Jennifer and her team also had to consider the numerous ways that clients could enter the campaign.

"We were allowing folks to refer their friends [and] open new crypto accounts on our platform but also enter via our social channels on Instagram and X. This can be really confusing in terms of giving clients a menu of options and different steps to follow to effectively enter and then have their entrance counted."

"It took some time to make sure we were really clear what steps folks need to take in order to be counted," Jennifer says. Gaps in the experience could put unnecessary pressure on customer support, so she and her team made sure to arm support agents with relevant FAQ information to address increased requests if needed.

On top of it all, the marketing team had to stay closely aligned with the legal team to ensure the program met regulatory requirements.

Results And Learnings

Even with all these factors, the giveaway launched on time — and drove impressive results.

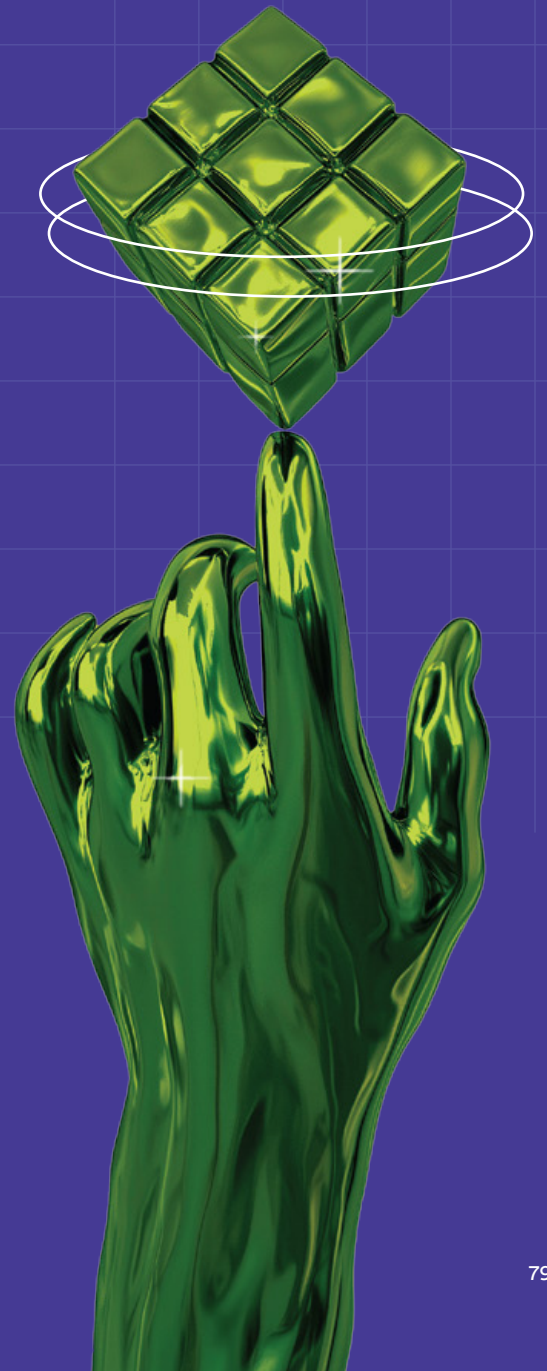
Jennifer recalls that Wealthsimple saw "millions of impressions across all of our channels. [It] was a really great way to make sure that we ultimately saw the reach that we needed for this campaign to be successful."

"So, all together, taking advantage of both the organic momentum that the product was already seeing and being part of that external momentum crypto as a whole was seeing and harnessing it through the campaign, in such a short period of time, was really rewarding."

"I think something that is generally undervalued here, because it's not quantitative, is the general brand play at a time when the market is hot and competitors are making noise," Jennifer notes. Adding Wealthsimple's voice to that noise surfaced the brand as a potential option at a time when clients and potential clients were considering what next step to take to grow their wealth.

The results of the crypto giveaway show the value of building a culture that enables quick deployment by working together to design experiments, analyze data, and launch iterations in response to moment-by-moment shifts in campaign performance.

Mapping the outcomes of these techniques has helped Wealthsimple organize its priorities and plan how to leverage engagement for a successful 2025. "It's been really valuable for us to connect the dots to see what we need to do or what we can do ... to help meet overall product goals."



Key Takeaways

How To Execute Successful Omnichannel Campaigns

Alex May: Stay Consistent And Watch The Data

- **Have a consistent formula for campaigns.** Start with the problem, then determine the KPIs that best indicate progress toward solving it. At the same time, don't get hung up on achieving perfection before a launch. "You need to work with what you have and put trust into the data and the tools you have at your disposal and make the most informed decisions that you can, but not let perfection hold you back from executing."
- **Leverage all available data.** Go broad with metrics like CLV and purchase behavior, then drill down to specifics like channel engagement to identify target segments with the most potential to influence KPIs. Pair this analysis with lifecycle data to visualize where customers are in their journeys and determine the best channels for reaching them.
- **Keep key stakeholders involved.** Know who to report to, what information they need to see, and how to present the data in ways they'll understand. The closer a stakeholder is to the leadership level, the more important it is to connect campaign strategy and performance to business goals.

Jennifer Finn: Track Everything, And Don't Be Afraid To Pivot

- **Know what success looks like from the start.** Define the desired outcomes of a campaign or experiment, and evaluate the data in light of those metrics to determine if it accomplished its purpose. "Did you ultimately see what you were looking for, Or did the campaign not end up performing the way that you had expected it to?"
- **Don't be afraid to pivot strategy.** Build fast feedback loops from data and client input. If something isn't working in the middle of a campaign, make changes right away to fix it.
- **Take advantage of every opportunity to experiment.** Put tools in place to enable quick execution and analysis. Use holdout groups to separate incremental value from baseline outcomes. Leverage the data to better understand customers and how they react to different content and channels.
- **Report on results as soon as possible.** Continually document conversion rates across content and channels. Don't be afraid to pivot strategy mid-campaign if something isn't working. Apply channel-level insights to build a growth model for future campaigns that supports broader quarterly or annual goals.

For both Alex and Jennifer, data played a critical role in campaign success. But its impact goes even further — all the way up to critical business decisions that can influence the success of entire organizations.

The next chapter will look at the role of Martech in centralizing key data points, analyzing engagement signals, and identifying impactful business opportunities and demonstrate how seasoned marketers leverage their tech stacks to get the best results.

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Data

CHAPTER SIX

For Driving Customer Engagement



“All customer engagement data is important as it’s reflective of all activities performed by customers — anytime a customer interacts with a brand’s digital or physical properties, whether that be in-app, on web, or in store. All of that information can then be used to categorize the customer and predictively model likes, dislikes, preferences, and future behaviors. We can then use those models to customize our next communication to a particular individual or enhance their experience.”

VISH RAMKISSOON

Chief Technology and Data Officer
Publicis Hawkeye

“Marketers historically haven’t had direct access to where data is stored — it’s often been siloed away from them. But those silos are disappearing as companies consolidate their data into data warehouses and organizations embrace composable Martech. Now, data from all systems flows into a central source, where it can be accessible for teams to analyze and, most importantly, activate.”

ALEC HAASE

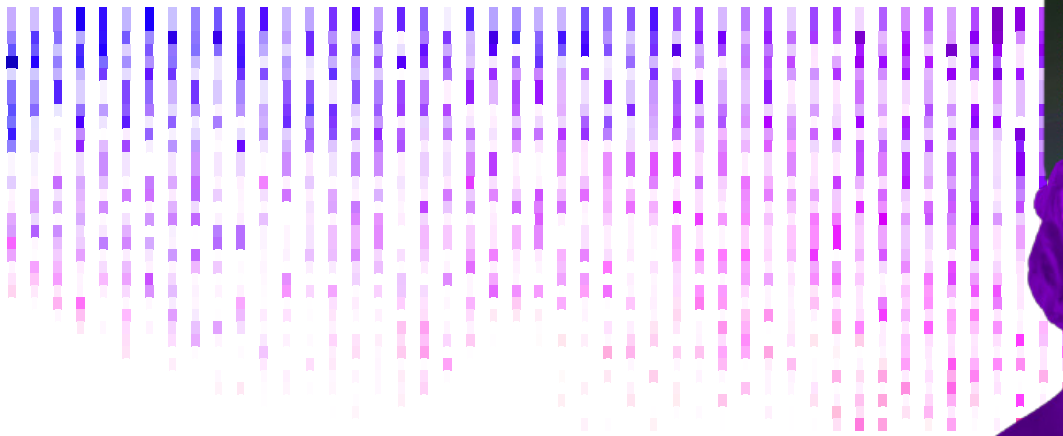
Product GTM Lead, Commerce and AI
Hightouch

“In the digital marketplace, customer engagement data isn’t just information — it’s the compass that guides strategic decision-making. Marketers who transform behavioral signals into actionable insights don’t just understand their customers better; they anticipate needs, personalize experiences, and create value that competitors can’t replicate. The difference between success and stagnation lies not in having more data, but in extracting more meaning.”

ANKUR KOTHARI

Martech Executive

Data explains Why & How We do it.



Data-driven business decisions get better outcomes.

Every successful omnichannel strategy, like the ones we explored in the last chapter, begins with a decision. Deciding who to target, which channels to use, what message to send, and when to send it. But behind each of those decisions is something critical: data.

Data helps marketers determine what goals to aim for, which KPIs to track, which moments matter most, and how to respond to changing customer behavior. It doesn't just influence what we do — it helps explain why we do it and how we measure whether it worked.



Still, having access to data and knowing how to use it effectively are two very different things. One of the biggest challenges marketers face is making that connection. Taking raw data and turning it into clear direction and smart decisions requires experience and tact.

In **Chapter 4**, we discussed how storytelling can bring data to life. When done well, storytelling helps marketers build influence, gain trust, and earn buy-in from key stakeholders. In this chapter, we'll go one step further and look at how teams can use those techniques when analyzing customer engagement.

You'll see examples of how data and Martech tools can be used to uncover insights, spot opportunities, and guide omnichannel strategies that not only keep customers engaged but also drive real business results.

“Data helps marketers determine how to respond to changing customer behavior.”

Turning Omnichannel Data Into Actionable Insights: Advice From Expert Marketers

Vish Ramkisson, Ankur Kothari, and Alec Haase, are well-versed in leveraging Martech to show how engagement impacts the bottom line and creating campaigns that get the results stakeholders want to see.

ANKUR KOTHARI

Ankur is a seasoned Martech Executive with a proven ability to harness technology for driving data-driven marketing strategies. With extensive experience as both a B2C and B2B marketing leader, he specializes in leveraging the power of data to craft impactful campaigns that resonate with audiences. His expertise spans personalized customer experiences, multichannel engagement, and real-time optimization of marketing efforts. Ankur has successfully collaborated with Fortune 500 companies such as JP Morgan, Northern Trust, and McKinsey, showcasing his ability to implement strategies that enhance customer engagement and retention while delivering measurable results.

VISH RAMKISSOON

Vish has over 20 years of experience in IT, including data analytics and marketing automation. In his role as Chief Technology and Data Officer at Publicis Hawkeye, he uses data to inform and design high-performing marketing campaigns for the agency's clients.

ALEC HAASE

As the General Manager of Hightouch's AI Decisioning product, Alec draws on his decade of experience in Martech to translate engagement data into actionable steps using modern AI capabilities.

Measuring Engagement To Power Business Decisions

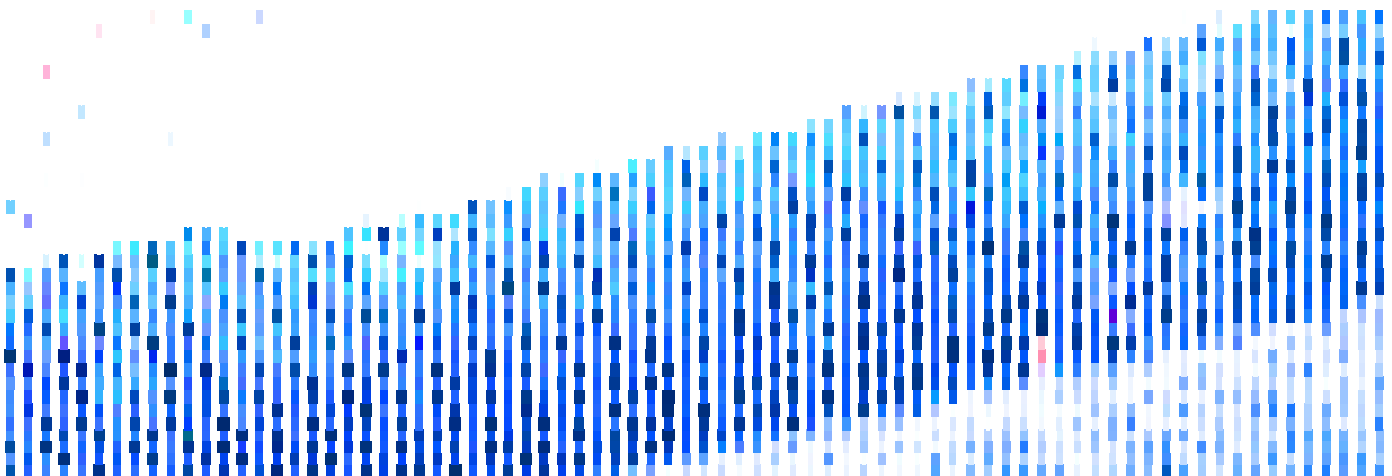
Putting data at the heart of business decisions starts with gathering the right data to measure engagement. Metrics like customer lifetime value, conversion rate, and churn rate only give part of the picture. Strategic business decisions require a more holistic view that includes:

- **Behavioral signals** that include traditional conversions like making a purchase or signing up for a subscription as well as micro-conversions like visiting a web page, shopping for a product, and clicking to learn more about a product
- **Customer journey data** from touchpoints across all channels, which uncovers patterns and trends in how customers progress through micro-conversions to final conversions
- **Demographics**, i.e. information on age, gender, location, income, and education level
- **Sentiment analysis**, which pulls information from social media conversations, customer feedback, reviews, and other brand interactions to reveal the general attitude surrounding a brand

“All customer engagement data is important as it’s reflective of all activities performed by customers — anytime a customer interacts with a brand’s digital or physical properties, whether that be in-app, on web, or in store,” Vish says. “The same applies to interactions with our communications, such as click-throughs, open rates, views, and conversion events for direct communications across all channels (paid and owned).”

Together, these four categories form a data pool,

that shows how customers interact with a brand’s communications across paid and owned channels and the actions they take in response to channel-specific prompts. With enough detailed data, marketers can begin to predict what next actions customers might take and adjust the messaging to encourage the next steps that support campaign goals.



“All of that information can then be used to categorize the customer and predictively model likes, dislikes, preferences, and future behaviors. We can then use those models to customize our next communication to a particular individual or enhance their experience.”

/Vish Ramkissoon

Chief Technology and Data Officer
Publicis Hawkeye

The Challenge of Data

Gathering data is one thing. Making sense of it is another — especially as the amount of available data continues to increase.

"As we are getting more digital savvy and most of the customers are moving to digital channels, we are getting a lot of data, and that sheer volume of data can be overwhelming," Ankur observes. "[Which makes] it very difficult to identify truly meaningful patterns and insights."

Far too often, data remains relegated to silos in separate departments. Marketers are left without access to the rich behavioral insights they need to support strategic decisions.

“The challenge is, if we have 10 million customers, each fairly unique in their own way, are we going to design 10 million communications for each one?”

- Vish explains.

You think about that for a second; let that set in. That would seem [like] an insurmountable task." Consolidating disparate data could solve the problem, but inconsistencies and inaccuracies can still result in poor or ill-timed decisions.

Trying to coordinate between technical and marketing teams compounds the problem because, as Ankur notes, "Many team members lack skills to properly interpret the data or apply data insights effectively." Data analysts don't understand the needs of customers or the goals of marketing campaigns and so fail to grasp why certain data is being collected or how it will be used. Marketers lack the technical skills and knowledge to identify the best tools for data collection and analysis, which leads to confusion over what's relevant and which data sources to prioritize.

Put it all together, and you have a recipe for a mess that obscures the connection between engagement and ROI and undermines data-driven business decisions.



Making Engagement Data Work

Centralizing data is the first (and most critical) step in taming the chaos.

"Marketers historically haven't had direct access to where data is stored — it's often been siloed away from them," says Alec. "But those silos are disappearing as companies consolidate their data into data warehouses and organizations embrace composable Martech. Now, data from all systems flows into a central source, where it can be accessible for teams to analyze and, most importantly, activate."

To ensure that data in these warehouses is accurate and usable, companies must establish clear guidelines for collecting, storing, and using data that include a consistent format to standardize incoming information. Automated tools that detect errors simplify the standardization process by cleansing data as it comes in so it reaches the warehouse in the correct format and doesn't clutter the system with duplicates.



But even with automated tools, it's important to conduct regular data audits to check for and address quality issues that could impact the reliability of stored data. Audits can reveal problems with syntax and data normalization that occur at the point of collection. Taking time to update forms with appropriate field types and building syntax checks into the submission process minimizes the amount of cleanup required once data reaches the system.



Separate Insights from Noise



With a central source of accurate data in place, marketers are in a better position to analyze and interpret engagement signals with an eye for actionable insights, including which metrics to focus on.

Business objectives serve as a compass to guide marketers toward the most actionable KPIs to measure. "It's like starting with the desired outcome and working your way back," Alec says.

Taking this approach requires a clear understanding of objectives and data needs across departments, not just marketing, and aligning around common metrics that

contribute toward everyone's goals. Marketers can use these metrics to determine how best to leverage different engagement opportunities and what campaign components will have the most meaningful impact on the target audience.

Alec uses Spotify's "Wrapped" feature as an example.¹ The campaign is part of the brand's overall strategy to create hyper-personalized music experiences. A combination of AI and machine learning analyzes the millions of small interactions that users perform as they browse and listen,² which provides rich insights into how Spotify can improve real-time listening and provide better recommendations in the context of the global music culture.

Paying such close attention to user behaviors has resulted in campaigns like Wrapped, which encourage engagement through a personalized — and highly anticipated — experience delivered directly to users inside the app. The short video summarizes users' listening habits from the previous year and encourages them to share the recap on social media, which may inspire others to give Spotify a try.

"In the case of Spotify Wrapped, you want to drive customer stickiness, you want to create a brand for Spotify, right?" he says. "To make that happen, we want to send a hyper-personalized email. Okay, what are the different components that we want in that email? Maybe it's the top five songs, top five artists, and then you can back into the actual event data that you need to make that happen."

For Spotify, that means consistently collecting data around listening habits and time spent on the platform and delivering it in a format that motivates ongoing engagement. But unearthing actionable data like this requires careful focus and analysis. Because the "events" Alec describes include any trackable action that a customer or user performs, marketers can quickly find themselves awash in a sea of noise.



To identify what's actionable in the midst of the turbulence, marketers must stay focused on business objectives and hone in on data that relates directly to the KPIs that drive bigger goals.

"Actionable data shows a clear pattern or trend that is statistically valid, whereas other data consists of random fluctuations or outliers which may not be what you are interested in," Ankur notes. "You also want to make sure that there should be consistency across sources. Actionable insights are typically corroborated by multiple data points or channels, while other data or noise can be more isolated and contradictory."



"Tracking an attribute or an event on-app or on-web for the sake of just tracking it makes no sense," Vish agrees. "If we want to be able to use data in a way that is smart, the due diligence needs to be done ahead of time to track attributes and events that can be actionable or provide insights."

Sometimes, though, apparently isolated signals could lead to valuable insights. "There's a lot of related data that otherwise would look to be noise to the average marketer," Alec says, citing small details like product tags that reveal which categories or characteristics customers interact with most.

This "noise" data can be used to train AI tools through

reinforcement learning, a process that teaches the software what works best for a given customer or user and enables it to predict the next best steps to keep them engaged.

"The system needs to learn over time to determine what works and what doesn't," Alec explains. "Purchase events feed back into the system, creating a continuous learning loop. The AI can then recognize patterns — saying, 'Hey, this worked really well. Alec has these specific attributes, and now I know that people like Alec respond best to this type of content.' It's all about the system learning, adapting, and improving over time."

Apply Insights To Create Engaging Experiences

Consistent tracking through a tool like a CDP provides real-time input to show when and how customers travel between channels and touchpoints. From there, it's a matter of transforming the moment-by-moment data into personalized messaging that leads customers to the next point of engagement.

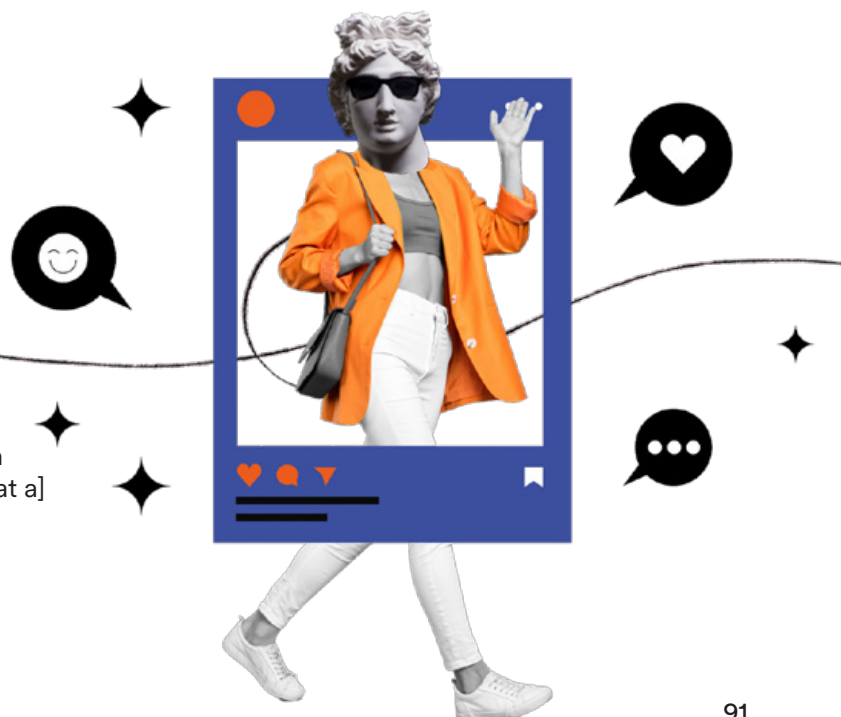
As **Chapter 5** illustrated, skilled marketers learn to analyze data to find the most profitable customer segments and create campaigns that encourage the behaviors most likely to drive results.

Careful analysis of how customers in each segment engage and respond reveals which channels to leverage for optimal engagement.

Getting such a detailed picture of each customer through the lens of their engagement patterns helps marketers understand what messaging will create an optimal experience. "So, for example, if you looked [at a]

certain offer on the website and you came from Google, and then the next day you walk into the in-person interaction, [an] agent will already know that you were looking at that offer," Ankur explains.

Reaching this level of nuance requires tools that dynamically translate real-time interactions and metrics into content across channels like webpages, email, and social media in response to behaviors.



Sometimes, finding the "right" messaging is simply a matter of changing a CTA or subject line to resonate better with a particular customer segment. Strategies like A/B testing drill down further to identify the best elements to adjust at a micro level for better results. AI agents go a step beyond to find the best combinations for each individual user quickly and at scale. The cadence at which these messages are delivered is just as important as the content of the messages themselves. Real-time responses are best for driving actions like purchases to ensure customers experience as little friction as possible.

"Let's say you browse a few items, but you didn't purchase [an item] or you didn't add it to your cart in the same session before you check out," Vish illustrates.

"If we are able to get those data points in real time, we would be able to push communications showing those items such as, 'Hey, do you want 10% off those shoes you were looking at?'"

But in cases like abandoned cart emails, immediacy may be seen as overwhelming or annoying, so delaying the communication triggers could be more effective.

Continual testing guides marketers to the right cadence and channel for each type of communication.

Align Teams And Departments Around Data



The same data that informs personalized marketing also influences decisions across teams in an organization:

- **Product development** uses analytics to plan future builds or identify areas for improvement by studying which products and platforms customers gravitate toward, how they utilize features, and what elements they interact with most. A detailed understanding of how customers discover and interact with products reveals barriers to conversion that can be removed to provide a better experience.
- **Sales** leverages behavioral data in partnership with marketing to determine the best content to deliver, which channels to deliver it through, and what products or use cases to highlight for specific segments.
- **Customer service** evaluates past errors that customers have encountered and tracks purchase behavior to anticipate support requests and prepare proactive responses. Aggregated data from customer service interactions can reveal patterns associated with churn and suggest actions to improve retention rates.

For these elements to come together into cohesive engagement experiences that serve company-wide goals, teams need to overcome the gaps in domain knowledge that can hinder data collection, analysis, and application.

Technical training for non-technical teams is also vital to ensure everyone has a complete picture of the tools, strategies, and data integrations required to reach critical business goals.

Training across all roles can help each team understand the “why” behind campaign and technology decisions and clarify how colleagues’ roles support successful outcomes.

Getting Buy-In

But a shared understanding isn't enough. Teams must come together in cross-functional collaborations that draw on diverse skills to execute mutually beneficial engagement campaigns. This requires merging departmental objectives to create a company-wide vision of success and prioritizing initiatives that move everyone closer to those central goals.

Not surprisingly, data is the key to convincing everyone to work together.

Data wins all arguments, right?

Vish points out. “So if we're going to support a business objective that's set by C-suite, or it's an OKR, or it's a KPI that we need to meet for shareholders, or any other reason, I think our approach is always to ensure that there are data points we can use to measure it.”

As noted in **Chapter 2**, the engagement metrics that matter most depend on which customer actions have the biggest impact on the bottom line. Once these have been defined, marketers can hone in on measuring, tracking, and analyzing the small actions that ultimately connect to the company's broader KPIs. Vish categorizes these actions as “highly engaged visits” or HEVs. “[It's] another way we look at things,” Vish explains. “Tracking an attribute or an event on app or on web for the sake of just tracking it makes no sense. If we want to be able to use data in a way that is smart, the due diligence needs to be done ahead of time to track attributes and events that can be actionable.”

As discussed in **Chapter 4**, visualizations like charts and graphs create a compelling story arc that demonstrates how data points measured throughout the campaign produced measurable results in critical KPIs.

Clearly demonstrating why a particular approach is important to specific stakeholders’ goals can open the door for business decisions that support impactful projects.

Identify 1:1 Business Opportunities

Having compelling business cases drawn from careful analysis of engagement data makes it easier to get alignment — and, ultimately, agreement. To determine which business cases to prioritize, marketers can analyze data for:

- **Unmet customer needs.** Studying customer behavior, interaction patterns, feedback, and support requests reveals gaps and points of friction that hinder engagement and affect KPIs. Taking action to improve these areas can directly impact business goals.
- **Options for cross-selling and upselling.** Understanding how a customer engages with products and departments at a larger retailer or e-commerce store can highlight opportunities to point them toward related products in other categories. "The benefit of doing that is obvious in terms of customer lifetime value," Vish says.
- **Emerging needs.** Changing customer behaviors and preferences can signal shifts in demand that call for a strategic pivot or the suggestion of a new offering that could promote ongoing engagement.
- **Opportunities to differentiate.** Areas where a company is outperforming its competitors present opportunities to leverage existing strengths and hone in on messaging that highlights unique selling propositions.
- **Untouched customer segments.** Detailed customer data analysis sheds light on unserved or underserved segments and niche markets. As Ankur notes, "[These] may represent untapped opportunities for growth or expansion into the newer areas and new geographies."



The Best Tools To Support Engagement And Reach Goals

Martech is the powerhouse that enables marketers to identify and take advantage of the most impactful business opportunities. As **Chapter 3** demonstrated, a robust Martech stack forms the foundation of every successful engagement strategy with tools that include:

- **A centralized data source.** Data warehouses compile every possible data point from systems across the company to create a comprehensive view of customer engagement. Marketers can draw on this unified source of truth sets to identify high-value customer micro-segments or cohorts for future campaigns.
- **Advanced analytics** leverage AI and machine learning to rapidly process data and uncover complex patterns that represent potential business opportunities.
- **Social listening tools** that continually monitor sentiment through customer interactions like brand mentions, discussions, and reactions. When combined with web and social media analytics, sentiment analysis tracks engagement across platforms to determine which efforts are most effective.
- **A Customer Engagement Platform (CEP)** pulls everything together with tools that deliver personalized cross-channel messaging. It gathers comprehensive engagement data from these messages, tracks channel interactions, and enables detailed data analysis in a cycle that supports ongoing improvements.

With these tools in hand, marketers can easily run experiments and analyze the data in real time to prove whether a business case is valuable enough to take to stakeholders. When it is, Martech also provides compelling reports to show how campaign-level KPIs benefit the entire company.

Future Trends In Business Strategy

Today's Martech tools already enable marketers to do far more than was possible even a few years ago, but future developments have the potential to further streamline campaigns and allow for a more granular approach to personalization.

AI is on track to be a major driver of these changes.

“What we are super excited about is this concept of AI Decisioning,” Alec says. “With this new wave of AI, marketers define their goals, provide creative options and guardrails, and AI agents learn from their data to determine the optimal experience for each user.”

Ankur predicts that AI will also “become more prevalent ... with advanced algorithms processing vast amounts of engagement data in real time to inform strategic choices.”

Pairing AI with innovations in data integration may enable companies to take a more customer-centric approach across departments and scale up 1:1 messaging efforts. AI's power to analyze millions of engagement data points could make it possible to pivot entire strategies in an instant with little human input. Instead of attempting to create individual messages for each customer, marketers could use data to put together pre-approved content modules, imagery, and copy and allow the AI tools to construct unique communications from that content.

Vish explains, “Generative AI is allowing marketers to deliver a level of personalization that's unmatched. Training the AI to adhere to all compliance and brand guidelines is becoming increasingly easier, and I'm sure from the time this article was written to when it's published, that level of ease and sophistication would have changed. Once the AI model is fully trained, organizations can be assured that the content being produced is brand and regulatory compliant, negating the need to have legal and/or human approvals.”

Leveraging these pre-approved modules enables marketers to shift from thinking about engagement in terms of campaigns to seeing it as a matter of influencing decisions. “Abandon this notion of campaign management and start thinking about decision management,” Vish advises. “In other words: If a customer does this, how can we predictively decide what they do next and reach them in their moment of need?”

If hyper-personalization efforts continue to become more nuanced, innovations in data collection will also be needed to address privacy and ensure that companies remain in compliance with regulations.

After all, the data that flows into today's CDPs and will power tomorrow's AI tools comes from real people with real concerns, and marketers will need to continue to become more transparent with how they collect and use data from their audiences.

Putting Consumer Engagement Data To Work: Actionable Examples For B2C Marketers

Marketers don't have to wait for the future to take advantage of Martech's power to apply engagement data in real-world scenarios. Alec, Ankur, and Vish leverage these tools daily to get results for their companies and the clients they serve.

Alec: Using AI Analysis To Deliver The Right Messaging

Hightouch uses AI-powered reinforcement learning to analyze engagement data and determine the best course of action for each campaign.

The company put its tools to work designing a campaign for a retailer that had the goal of using cross-sell purchases from its loyalty program to increase in-store visits.

"[They were] giving us all the different inputs that could potentially help a customer reach that goal. So that could be emails ..., it could be Facebook campaigns, it could be web experiences, and it could be all the different types and inputs of content into those campaigns as well. The system is then going and trying to learn what works best for each user. So it's making decisions like, 'Hey, this person needs an email [or] an SMS, and [it] should be this specific content at this specific time.'"

As Hightouch continues to see success with AI Decisioning, the insights derived can directly inform business decisions about which tools to invest in and how to utilize them to continually improve results.

“The system is able to figure out what to prioritize. It’s not like a marketer making rules to say like, ‘Hey, I know that this type of content works well on this type of audience.’ It’s the system figuring out what the best possible touchpoint is for each user.”

Ankur: Launching a data-backed product

In a previous role at a financial services organization, Ankur and his team analyzed a combination of engagement and transaction data to uncover a previously untapped business opportunity.

"We discovered that the last segment of our millennial customers were underutilizing our traditional credit cards but showed high engagement with the mobile payment platforms," he recalls.

"This insight led the company to develop and launch a digital credit card product that offered enhanced mobile features and rewards tailored specifically to the spending habits of that customer segment. The effort "resulted in [a] 40% increase in our new credit card applications from this [demographic] within the first quarter of the launch."

His results show that analyzing segment-level needs in addition to real-time shifts in behavior can reveal significant potential for growth — and give marketers a powerful business case for focusing on specific groups of customers.



Vish: Tailoring creative for unexpected customer segments

Publicis Hawkeye's analytics team provides clients with detailed reports analyzing engagement data to find key insights. Their approach often reveals unexpected findings, resulting in changes to targeting strategies and the creation of tailored creative content.

"Throughout my career, we've used various methods of advanced analytics to identify correlations between data points and desired customer outcomes. Most of the time, that's enough. But where we are able to make the most significant gains is where we are able to find unexpected correlations."

For example, prior to joining Publicis, Vish worked with an Original Equipment Manufacturer (OEM) that sold trucks. After augmenting their first-party data with a third-party data set, their models revealed an unexpected insight: there was a statistically significant group of very affluent

buyers. Vish remembers, "So we identified a high-net-worth group within our customer base, which meant that we needed to really deepen our understanding of exactly who these individuals are."

While the client primarily focused on a "working class" demographic, data analysis revealed a significant group of wealthy customers purchased trucks for their symbolic value. Consequently, a revised targeting strategy and customized creative content were developed. "We would personalize the content you would see in our communications once we knew you were part of this high net worth group," Vish explains.

By digging into the data and identifying who was buying these vehicles, Vish and his team generated such impressive results that the OEM continues to use this strategy to attract new clients today.

Strategic business decisions set the stage for customer engagement programs that take advantage of Martech's extensive capabilities to generate successful results. But marketers need a blueprint to help them build a tech stack that provides the right tools to support success.

The next and final chapter presents clear, step-by-step processes for evaluating an existing stack, identifying essential capabilities, and laying out a roadmap for a Martech stack that enables marketers to combine time-tested engagement frameworks with omnichannel adaptability in campaigns that drive sustainable growth.

Key Takeaways

- Using engagement data to make business decisions requires a holistic view of customers that includes demographics, behavioral signals, sentiment analysis, and journey data.
- Centralized data governed by clear standards for formatting, collection, and storage is critical to making strategic decisions.
- AI tools that analyze data and learn from customer engagement behaviors over time enable marketers to optimize campaigns to achieve outcomes that drive company-wide goals.
- Engagement data informs decisions across teams, including marketing, sales, product development, and customer service. Alignment between these teams is essential for reaching an agreement and moving forward on impactful projects.
- Marketers can zero in on business cases to prioritize by analyzing data for unmet customer needs, emerging needs, clear customer segments, and competitive differentiation opportunities.
- A Martech stack that includes data collection, AI Decisioning, analysis, sentiment tracking, and marketing automation enables marketers to execute successful campaigns based on data-backed decisions.

Glossary

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CHAPTER SEVEN

Frameworks

for Program Planning and Execution

“While creating and executing a customer engagement strategy can be challenging, these obstacles can be addressed through strategic planning, leveraging the right tools, fostering collaboration, and staying adaptable to the customer needs and industry trends. By tackling these challenges proactively, marketers can deliver impactful, customer-centric strategies that drive long-term success.”

**MIRELA
CIALAI**

Director CRM & MarTech at Equinox

Frameworks



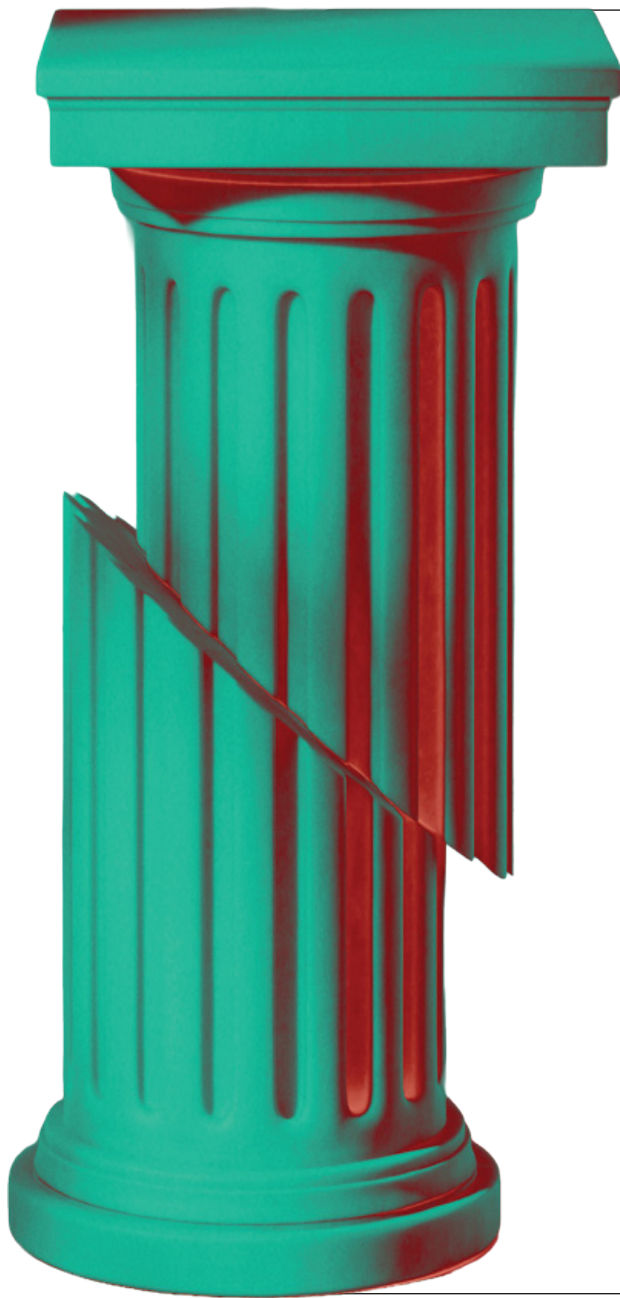
fit data together.

**Frameworks
enable
effective
marketing.**

If data is the foundation, marketing frameworks are the initial outlines that begin to fit data together into the shapes of impactful campaigns. They provide marketers with structure, clarity, and a path to follow from ideation to execution.

Marketers have always relied on some kind of framework to help them apply customer insights to campaign design. Despite the continuously evolving complexity of the B2C customer journey, some methods stand the test of time and are still valuable for modern marketing:

*The 7Ps*¹



- **Product**

or service a company sells, such as gym wear for active women.

- **Price**

customers will pay for it based on audience demographics and the current market.

- **Place**

where customers can buy the product or sign up for the service, which may be online, in a physical store, or both.

- **Promotion**

through campaigns that introduce potential customers to the product, including print ads, social media posts, and paid search.

- **People**

involved in creating, promoting, and distributing the product from initial product creation to post-delivery engagement.

- **Process**

used to deliver the product to customers, whether sending stock to a store or shipping directly to homes.

- **Physical**

evidence to support the brand's authenticity and show customers the type of experience they can expect, including a physical address, an operable website, and a recognizable brand with social backing from previous customers.

AIDA²

- Capture **attention** to make customers aware of a brand or product through initial advertising campaigns.
- Generate **interest** in the product with engaging cross-channel marketing that puts the product in the context of customers' lives.
- Create **desire** for the product among the target audience by showing how the product meets a pressing need or solves an ongoing problem.
- Drive **action** to encourage conversions through campaigns like product launch sales or first-time purchase discounts.

- Identify clear customer **segments** based on careful data analysis.
- Determine who to **target** based on opportunities for growth, such as the restaurant customers with low order frequency discussed in **Chapter 5**.
- **Position** the brand or product as the most appealing choice for the target audience, as Movable Ink did by delivering weather- and location-based messaging to the target customer segment in **Chapter 5**.

STP³

However, other approaches — especially the generic mass-marketing of the past⁴ — no longer work in a world where customers seek personalized interactions and marketers require real-time input to develop and adapt campaign messaging. At best, mass-marketing — and its modern equivalent, "going viral" — generate short-lived bursts of widespread attention that rarely lead to sustained engagement.

And then, of course, there's the funnel — an approach that stopped working the moment the customer journey became nonlinear, as noted in **Chapter 4**.

With the state of omnichannel marketing and customer engagement in constant flux, marketers can't expect even the most "tried and true" frameworks to stay reliable ten, five, or even two years from now.

The inevitable march of change can be seen as new frameworks appearing to replace the outdated and complement the timeless. These schemas incorporate essential elements that support personalization, improve engagement, and drive retention:

HOOK⁵

- An internal or external **trigger** marketers can leverage to move a customer toward a product or service, such as a felt need or an upcoming holiday season.
- Subsequent **action** that engages the customer and connects them to a brand, which may include launching a timely sale to encourage purchases prior to the holiday.
- Variable **rewards** that encourage repeated interactions with the brand's product or service like giving loyalty points with purchases or offering occasional surprise discounts to repeat customers.
- A small **investment** of time, money, or data that fosters a deeper connection and encourages ongoing engagement, such as using an app to redeem loyalty rewards.

(AARRR)

"Pirate" Marketing or "The Growth Funnel"

6

But the foundational framework for the modern marketer isn't what they use to design campaigns. It's the tech that ensures they have the tools and capabilities required to execute successful engagement efforts.

Putting that tech in place starts with a technology roadmap: a clear picture that shows how well the current tech stack supports marketing initiatives, what needs to be added to make future initiatives more impactful, and what steps must be taken to prioritize and implement new tools.⁷

Mirela Cialai understands exactly what marketers need to plan and build their tech frameworks. She has over a decade of experience working on engagement and retention initiatives, managing complex Martech ecosystems, and optimizing tech stacks. She currently leads CRM and lifecycle marketing efforts as Director of CRM and MarTech at Equinox.

- **Acquisition** efforts to help customers discover a brand through channels like paid search.
- **Activation** through initial interactions like giving a purchase discount to first-time customers who sign up for an email list.
- **Retention** via engagement efforts that bring customers back to brand channels and encourage future conversions, such as the informational welcome series described in **Chapter 2**.
- **Revenue** opportunities generated through customer interactions and conversions, as identified from business objectives and historical engagement patterns.
- **Referrals** from satisfied customers that spark interest among new customers or segments, which can be encouraged through referral programs that offer discounts for inviting friends and family to check out a product or brand.

The New Marketing Mindset: Retention Over Acquisition

Updating old frameworks to focus on engagement — and the tech that supports it — starts with a cultural shift toward prioritizing retention rather than customer acquisition.

This shift in culture must be accompanied by a shift in strategy that empowers marketers to plan and execute retention-focused campaigns. Quantifying the business value of retention and demonstrating how improvements in related metrics like churn rate, repeat purchase rate, and CLV benefit company-wide goals shows stakeholders the positive financial impact of investing in efforts that keep customers engaged over time.

According to Mirela, **"increasing retention rates by just 5% can boost profits by at least**

25% - 95%

And other statistics show that loyal customers are five times more likely to repurchase and seven times more likely to try new products or services.⁸

Delivering tailored messaging at the right time is key to achieving these results.

"Hyper-personalization and timely communication are essential components of a successful customer engagement strategy because they create meaningful, relevant, and impactful experiences that deepen the relationship with customers, enhance loyalty, and drive business outcomes," Mirela explains.

Hyper-personalized messaging can facilitate the transition from acquisition to retention by beginning to build deeper customer relationships from the moment of conversion.

"By framing retention as a driver of sustainable growth, the organization can see it not as a competing priority, but as a complementary strategy to acquisition, ultimately leading to a more balanced and effective customer engagement strategy,".

/Mirela Cialai

Director CRM & MarTech at Equinox

When messages align with customers' needs at just the right time, they're more likely to remain engaged — and come back to shop and purchase again in the future.

Challenges To Achieving Engagement And Retention

But even with a framework to guide them, marketers face challenges in designing and executing hyper-personalized engagement campaigns. According to the 2025 State of Cross-Channel Marketing Report from MoEngage, 52.6% of marketers cite "delivering personalized experiences" as their number one marketing challenge.⁹

As previous chapters have illustrated, top challenges to personalized engagement include:

- **Data silos** that obstruct a unified view of the customer and hinder personalization efforts, leading to poor campaign outcomes.
- **A lack of clear metrics** and associated ROI measurements that makes it difficult to connect engagement to results, which impacts efforts to optimize or build solid business cases for continued investment.
- **Internal silos and misalignment** between teams that results in inconsistent messaging that delays campaign execution and undercuts effectiveness.
- **Resource and budget constraints** that limit access to new tech to support real-time campaign monitoring and scalable personalization.
- **Resistance to change** that makes internal stakeholders hesitant to invest in updated systems or test new initiatives despite changing needs and trends.

In the face of these difficulties, Mirela offers a word of encouragement: "While creating and executing a customer engagement strategy can be challenging, these obstacles can be addressed through strategic planning, through leveraging the right tools, through fostering collaboration and staying adaptable to the customer needs and industry trends. And by tackling these challenges proactively, marketers can deliver impactful customer-centric strategies that drive long-term success."

Creating An Effective Technology Framework To Power Successful Campaigns

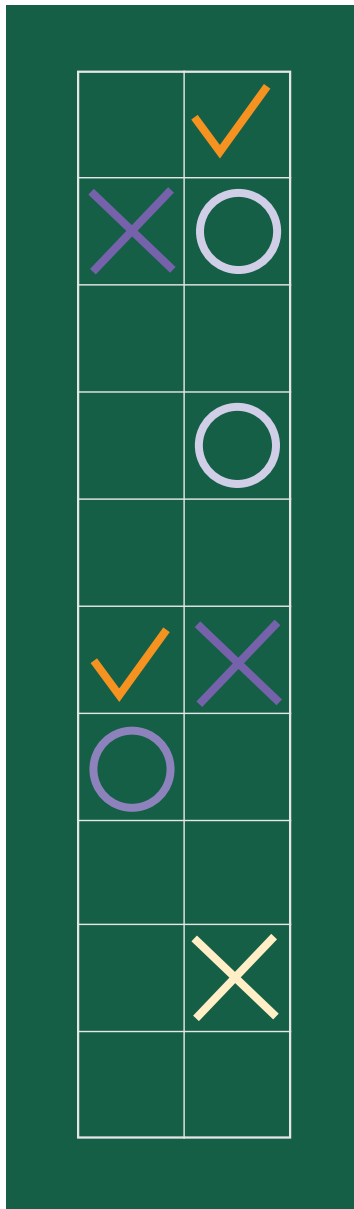
An integrated Martech stack gives marketers exactly the right tools to address common challenges and execute campaigns designed to encourage retention and support long-term goals. As discussed in **Chapter 4**, this involves connecting campaign results to business objectives and ensuring the right tech is in place to enable impactful initiatives.

52.6%

According to the 2025 State of Cross-Channel Marketing Report from MoEngage, 52.6% of marketers cite "delivering personalized experiences" as their number one marketing challenge.⁹



Analyze The Tech Stack: What's Missing?



Conducting a review of the current stack shows what's already in use and what needs to be added to achieve success.

The analysis can be broken down into five steps:

- **Define success** from the start. When retention is the priority, this may include objectives like increased engagement, more repeat purchases, or fewer lapsed renewals. During the analysis, look for tech to support these outcomes.
- **Inventory tools and functionalities.** Note utilization rates and areas where increased usage would create better results. Review integrations between tools, core systems, and the data warehouse to ensure all cross-channel customer data is available and accessible. Compare capabilities and results against industry standards and competitor practices to highlight areas for improvement.
- **Identify missing functionalities.** Consider the capabilities necessary to support campaign activities like performance tracking, real-time data analysis, and optimization. Determine if campaigns will require advanced capabilities like predictive analytics to support hyper-personalization. These activities may require tools that combine AI and machine learning with automation to deliver dynamic content in response to changing customer behaviors.
- **Look for opportunities to streamline.** Compare the cost of each tool to its business impact and ROI potential. Identify opportunities to consolidate multiple platforms into a single tool to increase efficiency and save money without losing functionality. This may involve making changes like switching to a CDP to handle both data collection and analytics or incorporating a cross-channel customer engagement platform to access a full range of functions that support omnichannel campaign design, execution, and management¹⁰.
- **Ensure support for growth.** Determine if the current stack can handle an increased load as the company grows and marketing campaigns become more complex. Tools should be equipped to process larger volumes of data, manage new channels, and serve expanded audiences without suffering performance issues or downtime.

As they analyze the tech stack, marketers must be alert for red flags that could hinder engagement efforts. According to Mirela, these include "data silos where customer data is fragmented across platforms and not easily accessible or integrated, [an] inability to process or respond to customer behavior in real time, a reliance on manual intervention for tasks like segmentation or data extraction or campaign deployment, and poor scalability."

An experience in one of Mirela's previous roles highlights the importance of conducting regular tech stack audits to uncover and address these red flag issues that hold marketers back.

"The CRM team I was leading faced significant challenges due to the lack of attribution capabilities and a reliance on surface-level metrics such as open rates and click-through rates in order to measure performance," she recalls. "This approach made it difficult to quantify the impact of our efforts on broader business objectives such as revenue growth.

"Recognizing this gap, I worked on defining a vision for the CRM team to address these shortcomings. Our vision was to drive measurable growth through enhanced data accuracy and improved attribution capabilities, which allowed us to deliver targeted, data-driven, and personalized customer experiences. And to bring this vision to life, I developed a roadmap that focused on first improving data accuracy, building our attribution capabilities, and delivering personalization at scale."

To ensure data consistency across the marketing ecosystem, Mirela led efforts to align email engagement data between the customer data platform (CDP) and the email service provider (ESP). She partnered with the data team to address discrepancies at scale, strengthened data governance practices, and evaluated the effectiveness of key integrations to support reliable, end-to-end data flow.

“Aligning the vision with these strategic priorities, we were able to demonstrate the tangible impact of our efforts on the key business goals,”

/Mirela Ciala,

Director CRM & MarTech at Equinox

Create A Step-By-Step Tech Roadmap

Using the insights from a tech stack analysis to create a roadmap for Martech success is a big job. Approaching the task in phases makes it more manageable — and safeguards against missing critical steps.

Building a foundation in the first phase sets the stage by addressing errors with data and system integrations. With reliable data and workflows in place, marketers can move on to defining the best campaign metrics to prioritize based on the vision of success they defined during the analysis.

From there, it's on to testing the stack with initiatives that generate early wins. A framework like the impact effort matrix¹¹ helps marketers decide where to focus by weighing the potential benefits against the resources, time, and complexity involved in executing a campaign. "Quick win" campaigns generate the greatest impact with the least effort and should take precedence so marketers can quickly identify where and how to improve the tech stack.

"I would focus on projects that deliver the greatest impact on business goals, on customer experience and ROI while [considering] feasibility, urgency, and resource availability," Mirela advises. "In the past, I've used frameworks like the 'Impact versus Effort Matrix' to identify the high-impact, low-effort initiatives and ensure that the most critical projects are addressed first."

Impactful campaigns combine personalized messaging with automated workflows that streamline personalized delivery, collect immediate feedback, and implement timely improvements. By drawing on behavioral data, marketers can ensure that customers receive immediate value from messaging at every touchpoint in their journey.

Campaign results directly inform the final phase: optimization and expansion.

Engagement data and KPI improvements highlight the most valuable capabilities to introduce to the stack — and which existing capabilities will continue to generate good outcomes. Examining and refining attribution models is also valuable at this stage to gain a better understanding of which channels and actions drive the most impact.

Putting It All On PAPER

To make the entire process from analysis to optimization easier, Mirela developed a five-step framework she calls PAPER:

“The PAPER framework — Plan, Audit, Prioritize, Execute, and Refine — provides a structured, iterative approach allowing marketers to create a scalable and impactful customer engagement strategy.”

Plan: Lay the groundwork for the roadmap by defining strategy and aligning it with business goals.

Audit: Evaluate the current state of the tech stack's capabilities. Conduct a comprehensive audit of the tools, data, workflows, and the end-to-end customer journey to identify gaps between the current experience and the ideal state.

Prioritize: Choose marketing initiatives based on impact, feasibility, and ROI potential.
Execute: Implement the roadmap in manageable phases.

Refine: Continuously improve performance and update the roadmap.



Aligning Teams Around The Tech Roadmap

For Martech to serve broader business goals, cross-functional cooperation on the tech roadmap is essential. Teams must establish a shared understanding of the roadmap's purpose, how it serves the company as a whole, and how each team can contribute to building and utilizing the stack successfully.

As discussed in **Chapter 4**, bringing all stakeholders into the planning process early and encouraging collaborative planning ensures the roadmap takes everyone's perspectives and needs into consideration. Collaborative efforts create shared accountability by giving each team a role in executing the roadmap and clearly defining the necessary projects and tasks.

Task-tracking tools that provide real-time updates enable teams to analyze progress through the roadmap and quickly identify bottlenecks that could delay the process. Throughout the stages of execution, regular meetings offer time to share detailed updates, identify and address challenges, and celebrate key milestones.

A culture of collaboration creates alignment that supports ongoing efforts to keep the tech stack up to date and enables continued investment in profitable retention efforts.

Strategies For Building A Customer Engagement Tech Roadmap

The PAPER framework provides a solid structure to guide marketers and cross-functional teams through the process of planning and executing a successful technology roadmap. To complement the framework, Mirela offers four lessons from her experience with Martech optimization:

- **Focus on impact to ensure that tech will directly support critical outcomes.** "Whether the focus is on retention, customer lifetime value, [or] revenue growth, the roadmap must bridge the gap between high-level business goals and actionable initiatives."
- **Prioritize foundational elements like data cleanup, integrations, and governance before bringing in advanced capabilities.** "The roadmap is only as effective as the data and systems it's built upon. Skipping this step can lead to inefficiencies or missed opportunities later on."
- **Foster collaboration from the start to establish a retention-focused mindset that highlights the value of investing in tech to support engagement campaigns and enable continual optimization.**
- **Remain adaptable by responding to customer data, campaign results, and emerging technology trends.** Be open to replacing outdated frameworks with new tools and techniques designed to improve campaign execution over time.

A well-designed tech roadmap empowers marketers to experiment with classic and new marketing frameworks to deliver hyper-personalized campaigns that support retention and impact business outcomes.

Building adaptability into the stack ensures that the right tools will always be available to deliver engaging messaging regardless of how cultural trends, societal forces, or customer behaviors change in the future. customer-centric strategies that drive long-term success."

Key Takeaways

- A technology roadmap identifies and outlines all the tools, capabilities, and functionalities marketers need to execute effective engagement campaigns that drive retention.
- The Plan, Audit, Prioritize, Execute, and Refine (PAPER) framework provides a structure with five clear steps to help marketers create a tech stack that supports impactful engagement strategies.
- Routine tech stack analysis clarifies what tech is currently in use, what additional capabilities are required to support campaigns, and how best to optimize the tech stack for efficiency and growth.
- Early alignment between stakeholders and continual collaboration is essential for planning and executing an effective tech roadmap.

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Conclusion

Change, in marketing, is more than inevitable. It's the core of every strategy you develop, every customer story you share, and every opportunity you pursue. In this book, you've heard from thirteen seasoned leaders who have navigated evolving consumer behaviors, recognized the power of retention over acquisition, and leveraged technology, personalization, and real-time analytics to execute effective omnichannel strategies.

Yet, the most important journey is yours. You now have practical frameworks, tools, and real-world lessons from industry experts who've successfully navigated change to transform their brands. Your strength as a marketer lies not in trying to control change but in being observant, flexible, and responsive to shifts in consumer expectations and market realities.

"Adapt or die" is not simply a cautionary tale; it represents an enormous opportunity. Adaptation allows you to build stronger connections, create deeper resonance, and convert interactions into lasting relationships. The marketers you've heard from in this book didn't just cope with change, they thrived because of it. You have the tools to follow their lead.

Your next steps are clear: put these insights into action. Test new strategies, measure results, and refine your approach. Communicate your vision effectively within your organization and inspire stakeholders with stories of what's possible. Your capacity to influence change internally will amplify your ability to navigate external shifts.

Remember, your role is more than reacting to change. It's leading through it. Embrace uncertainty as an invitation to innovate and let challenges inspire creative solutions. The next chapter is yours to write. Do so authentically, confidently, and compassionately. In the evolving landscape of customer marketing, you aren't simply participating—you're leading the way.

Get Access to the Worksheet

Continue the momentum by accessing MoEngage's customer engagement worksheet templates by scanning this code:

A large, faint background image of Michelangelo's 'The Creation of Adam' statue, showing two hands reaching towards each other. One hand is on the left, reaching right, and the other is on the right, reaching left.

Shape the future of marketing

Adapt boldly, lead with purpose

Ready to
redefine what's
possible?

Thank you.



About MoEngage

MoEngage is a customer engagement platform for consumer brands, that empowers marketers and product owners with AI-driven insights to create cross-channel experiences that customers love. Trusted by 1,350+ global consumer brands such as SoundCloud, Poshmark, Citi, Nestlé, Domino's, McAfee, Samsung, 7-Eleven, Deutsche Telekom, and more. MoEngage powers personalized digital experiences at scale. It facilitates an open-source approach, allowing brands to adapt their diverse marketing technology stacks to integrate engagement across all platforms utilizing AI to enable and support marketers.

Unlike campaign automation and analytics tools, which force marketers to be campaign-centric - MoEngage enables marketers to be customer-first. With intelligent insights about customers' journeys, preferences, lifestyle affinities, and more, our AI-driven platform empowers marketers and product owners to deliver cohesive, personalized communication across channels including email, app, web, SMS, and beyond!

Consumer brands across 60 countries use MoEngage to power digital experiences for over 1 billion customers every month. With offices in 13 countries and more than 750 employees, MoEngage is backed by Goldman Sachs Asset Management, B Capital, Steadview Capital, Multiples Private Equity, Eight Roads, F-Prime Capital, Matrix Partners, Ventureast, and Helion Ventures. MoEngage was also named a Strong Performer in The Forrester Wave™: Cross-Channel Marketing Hubs Report for Q4 2024.

To learn more about MoEngage,
Scan the **QR Code**



or email us at
hello@moengage.com

“Embracing change is the job...
There’s no way around it.”

Juan Mendoza, CEO, The Martech Weekly

The Customer
Engagement Book
Adapt OR **Die**

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