

# PEOPLE-BASED MARKETING: CRM IN THE DIGITAL AGE

Definition, Landscape, Vendor Selection





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# PEOPLE-BASED MARKETING



## PEOPLE-BASED MARKETING

### THE LANDSCAPE

CRM means different things to different people, making the landscape very complicated.

Throughout this paper, several terms are used:

#### **Customer Relationship Management**

Customer relationship management (CRM) is a comprehensive approach to managing interactions with consumers in order to market, sell to, and serve customers. For some, CRM refers strictly to a set of software suites (i.e., Salesforce, SAP, Oracle, Adobe, Microsoft) that manage data and information. However, in order to cultivate and nurture lasting customer relationships, businesses need people, processes, and technology to manage interactions effectively.

#### **Customer Relationship Marketing**

Customer relationship marketing (also CRM), refers to acquiring, maintaining, and retaining profitable relationships through marketing strategy and tactics. It leverages data from all customer touchpoints within an organization (first-party data) and external sources (second- and third-party) to give a holistic view of the customer and his or her relationship with a brand. A subset of CRM (management) solution components are needed to enable CRM (marketing), and these components are referred to as the marketing tech stack. For the purposes of this paper, CRM will refer to customer relationship marketing, unless otherwise noted.

#### **People-Based Marketing**

While customer relationship marketing practitioners have been busy integrating data, drawing insights, and activating insights for “knowable” customers, digital practitioners have been determining how to reach and engage “anonymous” consumers through new vehicles beyond email and direct mail. In the process, digital platforms with the ability for individual targeting have emerged. People-based marketing (PBM) is the new CRM, but with addressability at much greater scale than what was achievable previously.

At Merkle, PBM is a comprehensive approach to managing marketing interactions in order to maximize customer lifetime value (LTV). PBM requires everything that CRM required – customer strategy, performance marketing programs, and enablement. But in addition to activation in direct mail, email, phone, and site, programs are activated across digital vehicles, delivering the full scale that CRM has always needed to truly transform traditional marketing.

## THE CAPABILITIES

### The People, Processes, and Technology Behind PBM

The people, process, and technology that make PBM possible include customer strategy, performance marketing, and marketing enablement. In the following section, each of these capabilities will be described in more detail.

# PBM Capabilities



## **CUSTOMER STRATEGY**

People-based marketing is rooted in solid customer strategy. In the *Art of War*, Sun Tsu shares the wisdom of only engaging and investing in battles that can be won; anything else is a waste of resources. As businesses battle for market share, investing in consumers that can be won (and profitable) is key. A solid customer strategy defines the customer investment and win plan.

### **Portfolio Optimization**

The organization must quantify consumers' real or expected LTV to the company and determine how much to invest in specific market segments to minimize risk while maximizing return. Creating actionable strategy requires organizations to determine how much to invest in individuals from a media and offer perspective.

### **Enterprise Segmentation**

Within the most valuable market(s), the organization must also determine how to persuade individuals to engage in profitable behaviors. This requires an enterprise segmentation scheme based on motivations, those rational and non-rational drivers of decisioning in the category. Actionable enterprise segments are projected onto databases and data management platforms (DMP).

### **Life Cycle Strategy**

For the organization to act in a unified manner, strategists must guide coherent investment decisions and prepare to design a compelling experience. For each micro-segment (e.g., the combination of motivational segment and LTV tier), the organization must allocate budget and define key performance indicators (KPI) (business, customer, and marketing) to each life cycle stage and define the win strategy.

## PERFORMANCE MARKETING

While customer strategy has far-reaching organizational implications, the PBM lens is one of measurable marketing outcomes, or performance marketing. To provide data-driven experiences that lead to longer, more profitable relationships, marketers must anticipate customer journeys and develop the marketing response to deliver at each engagement point. The pivot from “defining the journey” to “anticipating the journey” is critical for PBM to be customer centric. Because organizations cannot *manually* develop an infinite number of marketing responses for the journey, marketers must design and develop the experience components based on insights from the segment strategy.

### Experience Design and Optimization

This endeavor begins with journey insights and macro journey mapping to align offer, creative, content, asset, message (and associated sequencing), media, and channel with life cycle stages (and the positioning and KPIs defined by customer strategy). It continues with detailed micro-journey mapping to identify every likely permutation that individual consumers can take and is supported by the experience to be delivered at each interaction point. As experiences are tested and insights gained, they must be redesigned to address breakage points in the journey.

### Program Planning and Optimization

Program design breaks the journey map into manageable campaigns that can be tested and optimized to achieve a clear business outcome. The program plan specifies the audience, offer, creative, and message (including sequencing), as well as the content to activate across specific media and channels. The test plan is a design-of-experiments approach to ensure that testing is done in accordance with the highest of standards.



## Media and Channel Activation and Optimization

As advertising technology has evolved, marketers can connect with publishers in an automated and scalable fashion. To leverage today's media, organizations need a combination of media planning, traditional and programmatic media buying and optimization, and platform management capabilities. Much of the planning component includes translating the program into a digital audience strategy, media testing and reporting, and budgetary guidance for each medium. But for media buying and optimization and platform management, competencies are often specialized, because success lies in managing and continuously integrating individual platforms (e.g., Google, Facebook, Twitter, Amazon, Walmart, AOL, Apple), tech partners, and ad tech partners. It is key to have media capabilities in search engine optimization (SEO), search engine marketing (SEM), display advertising, paid social, mobile, and direct mail.

As opposed to media (outbound interactions), channel is the means by which customers engage in an inbound manner (site, phone, POS, apps). The ability to leverage data and manage enhanced customer experiences and interactions does exercise traditional channel design expertise. But it also requires personalization capabilities to enable dynamic insertion, customization, or suggestion of content in any format that's relevant to an individual based on context (i.e., prior behaviors, predicted value, and inferred motivations).

## Creative and Content Activation and Optimization

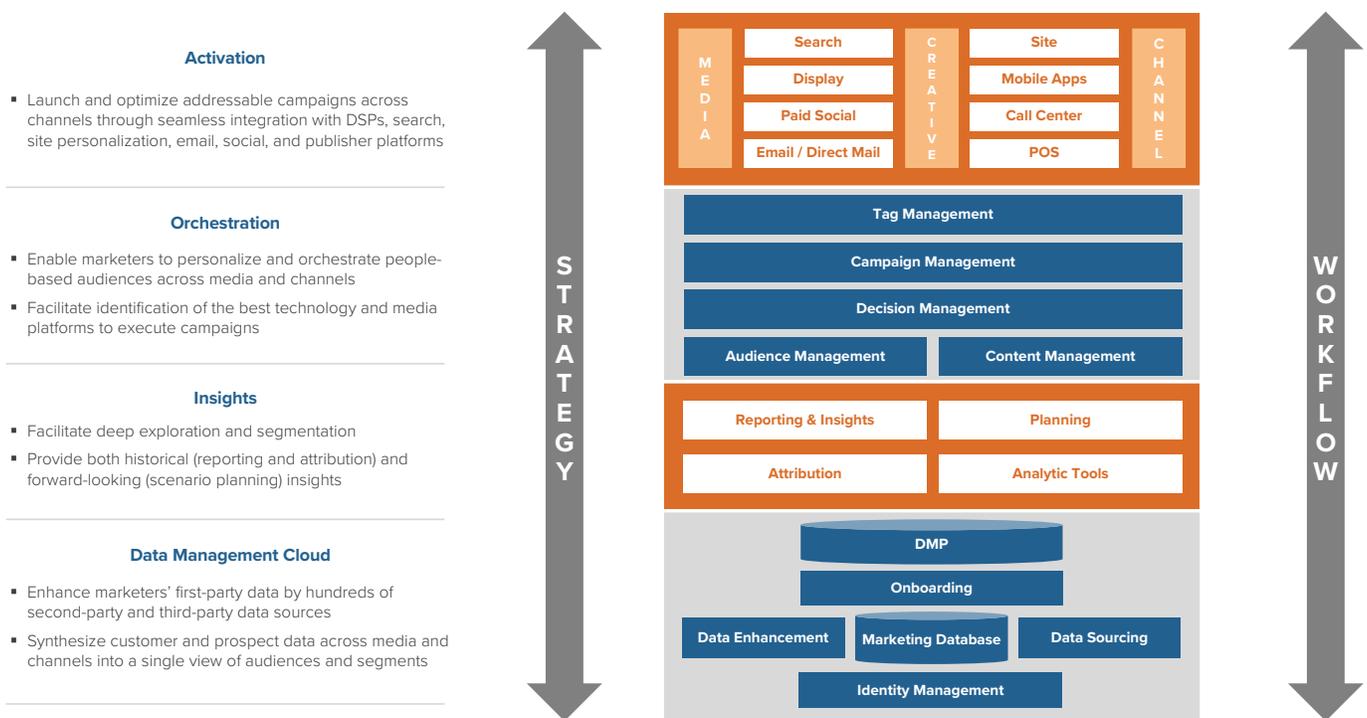
Along with the ability to design, create, and produce creative content, today's agile marketing environment is an increasingly data-driven exercise. Initial concepting begins with audience insight and program plans, leverages learnings from prior campaigns, and continuously optimizes creative assets based on rigorous testing. Although it's not possible to manually create unique treatment for each individual, by anticipating the customer journey (see above) and prioritizing audience dimensions for which to design (e.g., product, motivation, life cycle phase), creative can be dynamically assembled so treatment is personalized and delivered on an individual basis. Over time, learnings lead to increasingly optimized treatment.



## MARKETING ENABLEMENT

Enablement refers to the data, tools, and technology to define, understand, measure, and activate people-based marketing. It starts with synthesis of customer, prospect, and marketing data across all channels into a single view of audiences and segments to support people-based campaigns. Data is transformed into insights about audiences, campaigns, programs, and tactics to plan for and evaluate performance. Insights are activated and orchestrated across media and channel.

## Merkle: A Fully Integrated People-Based Marketing Suite



### Data and Audience Management

- Identity Management:** By creating unique identity maps for each individual, anonymous and known interactions are aggregated at the individual level into a single event stream that enables targeting, personalization, measurement, and insight.



- **Marketing Databases:** The marketing database is still the core data management component of the technology stack. It serves as the single source of truth for prospect and consumer event records, which allows for publishing of data to other marketing technologies.
- **Data management platform (DMP):** A centralized technology system allows businesses to create target audiences based on a combination of in-depth first-party and third-party audience data. The DMP enables precise targeting of campaigns to these audiences across ad networks and exchanges, as well as accurate measurement of best-performing campaigns.
- **Data Sourcing and Enhancement:** The meticulous identification, evaluation, and sourcing of second- and third-party data ensures the most effective prospecting, universe sizing, modeling, and analysis. The first-party data strategy and governance functions are critical as well.
- **Onboarding:** The process of loading offline data to an online environment begins by matching customer information (name, email, address, phone number) to online entities, and must include anonymizing data to maintain privacy.



## Insights

- **Reporting and Insight:** Raw data is transformed into information in order to yield an improved understanding of customer needs, behaviors, and overall profile. Campaigns and programs can then be evaluated for performance. Reporting can be divided into audience, experience, and measurement insights.
- **Attribution:** Data and analytics are used to determine how much marketing credit to assign to each marketing activity in order to compare contribution and cost of different marketing tactics.
- **Analytic Tools:** The analytics platform is the set of tools and capabilities, ranging from applications to statistical workbenches, that allow analysts to perform their work. It also includes a data layer to allow for rapid, iterative analysis, as well as longer, more in-depth studies.



### Orchestration:

- **Tag Management:** The process of configuring, connecting, and maintaining tags/pixels on websites, creative assets, mobile applications, and emails allows for data collection, proper content delivery, and browser-level tracking.
- **Dynamic Creative:** These tools are used to serve relevant content to consumers by swapping different elements of the ad (e.g., message, creative, call to action) based on business rules.
- **Decision Management:** The core for operationalizing insight, decision management coordinates the execution of algorithms and business rules across interactive channels and media. It serves as the centralized decision engine to drive continuity across touchpoints.
- **Content Management:** Capabilities must be in place to enable collection, management, and publishing of creative assets. It includes the metadata that allows for classifying creative assets into various dimensions.
- **Campaign Management:** Capabilities to segment, target, and manage multi-channel, multi-stage campaigns should be carried out in a streamlined, repeatable, and preferably automated manner.

# 2

# INDUSTRY INFORMATION



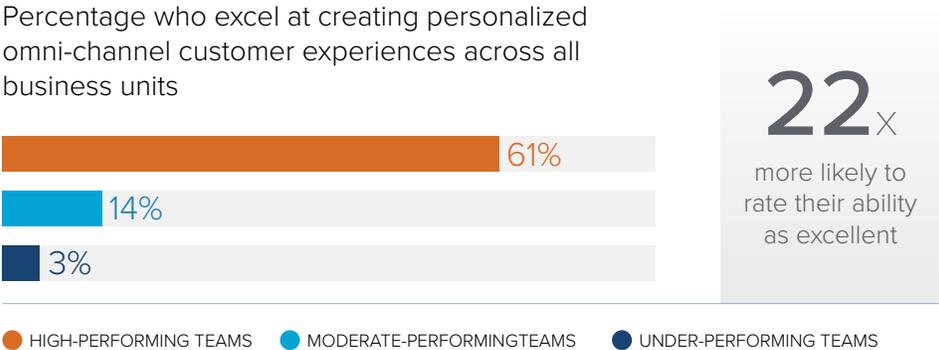
# INDUSTRY INFORMATION

## INDUSTRY REVIEWS/WHITE PAPERS/REPORTS ON TRENDS

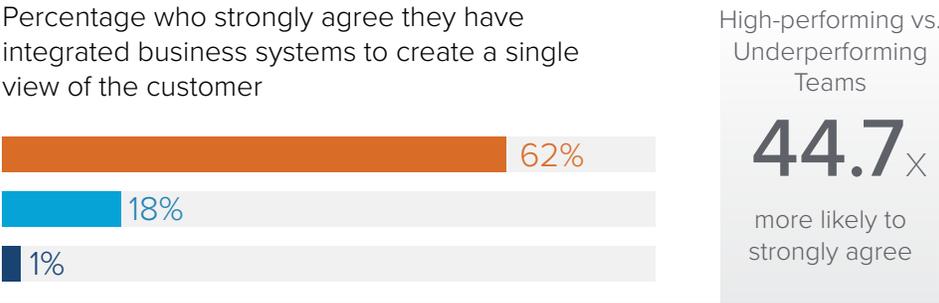
### Salesforce: Leading the Customer Experience in the Consumer Products and Retail Sector

Salesforce Research surveyed 600 consumer products and retail marketers to learn how they responded to these industry changes and challenges. Here are three key findings:

- 1. High-performing consumer products and retail marketers collaborate across business units to deliver personalized, omni-channel customer experiences. They're 22x more likely than underperformers to say they are excellent at creating personalized omni-channel customer experiences across all business units.



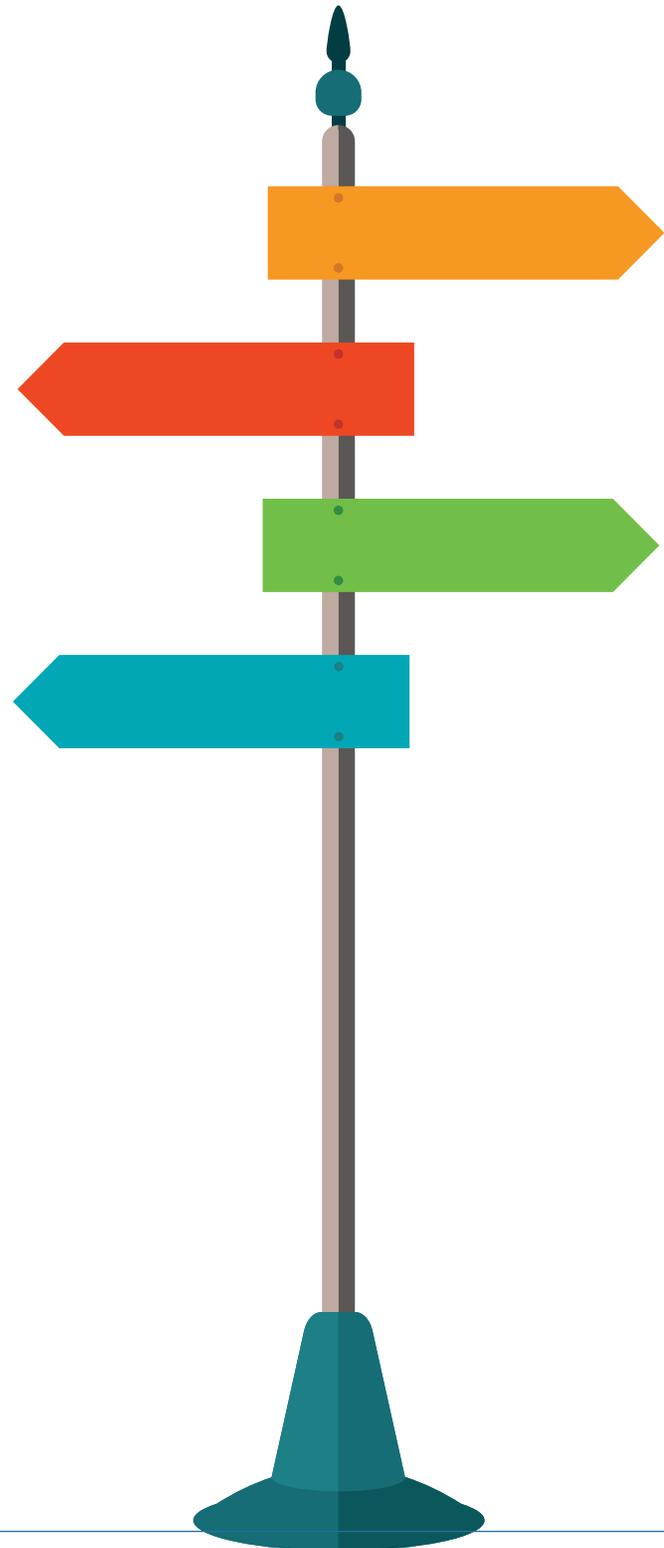
- 2. Consumer products and retail marketing leaders understand the value of integrating systems and data from across the organization to create a single view of the customer. Sixty-two percent of high performers agree they've integrated systems to create a single view of the customer compared to only 1 percent of underperformers.



- 3. Top consumer products and retail marketers implement customer journey strategies. Compared to only 46 percent of underperformers, 89 percent of high performers agree that a customer journey strategy is critical to the success of their overall marketing strategy.

## MARKETO 2017 Marketing Predictions

1. We'll see an aggressive shift in attention toward increasing customer spend, including building relationships and engaging customers in personalized, relevant ways at every stage of the life cycle.
2. As marketing takes a more active role in driving a "customer-obsessed agenda," organizations will transform at different paces. Technology will play a critical role in this transformation to listen to digital signals and respond by orchestrating programs.
3. There will be an increased focus on building authentic connections and a shift toward giving as much as you get. More companies will use customer advocacy as a strategic weapon.
4. Specialization is no longer the ticket to success. The trend is to build a team of "full-brain marketers," as the trend shifts toward leaders who are multi-talented generalists and can handle a myriad of challenges from creative and brand design to product marketing and demand generation.
5. It will no longer work for marketing to think and operate in silos. Marketing should be working with sales, customer success and services, support, education, production, and operations.





6. Many marketing organizations will finally find that perfect intersection between fulfilling customer needs, storytelling, and digital interactions. Any organization missing one of these functions is destined to fail.
7. The era of specialization will slowly fade outside of marketing as well. Designers need to be multi-versed in all forms of design, from visual to graphic, web, production, UX/UI, video, and photography.
8. We need to think about how all our systems connect and work together. For marketing, we rely so much on technology and data, and when they are not optimized, it can be expensive and highly inefficient.
9. Top performing companies will successfully roll out account-based marketing strategies by mid-year. Sales effectiveness will increasingly rely on strong performing predictive scoring models.
10. Marketing will shift away from its tried and true formula for engagement and instead incorporate techniques to engage buyers at every stage of the life cycle.

## DESTINATIONCRM.COM – 10 CRM (CUSTOMER RELATIONSHIP MANAGEMENT) TRENDS TO WATCH IN 2017

1. Department silos will continue to fall. Traditionally, sales, service, and marketing have acted independently. “The megatrend of customer success is breaking down the barriers between sales, marketing, and service,” explains John Ragsdale, vice president and research director at the Technology Services Industry Association (TSIA).
2. Technologies will converge. Businesses will grow weary of so-called best-of-breed solutions that present integration, implementation, and deployment challenges. This is especially important considering that most companies still buy their CRM technologies in separate pieces for each individual department.
3. Knowledge sharing and collaboration will increase. Data must be readily available across department lines. “The transition we’re seeing is that [businesses are] realizing that the way to really move with the customer at scale, and with the speed of the customer journey, is to look to systems of insight rather than information,” says Jeff Nicholson, vice president of CRM product marketing at Pegasystems, a provider of business process management and customer engagement software.
4. Users will be better able to blend channels. Most of the major CRM players have started to investigate such technologies in a big way. Salesforce.com, for instance, has been making noise around its Einstein AI solutions. Pegasystems has invested in robotic automation to help with routine tasks. Oracle has introduced adaptive intelligent cloud applications that tackle common ground. Similarly, IBM’s Watson has cognitive computing tools that learn over time to cut corners. It wouldn’t be surprising to see others entering this market in the near future.
5. Behavioral insights will go deeper. Another growing trend in 2017 will be the continued extension of customer journey analytics to provide insights beyond simply observing what people are doing to understanding the why behind it. “Without understanding the why, customization can only go so far,” says Yuping Liu-Thompkins, chair of the marketing department at the Strome College of Business at Old Dominion University in Virginia. Of course, the question of why is not easy to answer, she says, because it goes beyond tracking typical behavior. “You might need to bring additional insights from social media, from traditional marketing research. There’s more of that qualitative insight that needs to come into the CRM system,” she says. And there’s a growing need to integrate customer service phone records with transactional data and marketing campaign analysis information, Liu-Thompkins emphasizes.

6. CRM will become (even) more automated. With the emergence of artificial intelligence, cognitive computing, machine learning, deep learning, virtual reality, intelligent assistants, and a host of other buzz terms, the talk of robots taking over bubbles up in our culture more than ever. Consequently, the trend is to automate as many customer interactions as possible to enable customer self-service. “What this means for companies is that they need to make self-service journeys easier.”
7. Routine tasks will get more streamlined. The appeal of automation is not strictly limited to customers. All business professionals are also consumers, after all, and there are many things they’d rather do than jump through hoops to achieve their goals. It’s no surprise, then, that chatbots, virtual assistants, intelligent assistants, and other such tools have begun to gain traction. Experts expect them to play an even more dramatic role in customer-facing professionals’ day-to-day activities.
8. Adoption will rise (finally). Look for technology to also continue to help the CRM industry overcome the adoption challenges that have long been its greatest obstacle. Because it was a chore, many professionals simply didn’t like to use CRM. Gamification is one way software vendors are making it more enjoyable to use CRM systems. Companies like Badgeville (recently acquired by CallidusCloud) offer tools that are meant to stimulate competition and participation among sales teams and individuals.
9. CRM will become a little more vertical. While it is by no means becoming the norm for companies to invest in CRM systems that are designed specifically for use in one industry or another, analysts point out that larger CRM vendors are offering additional software and services that apply to a number of verticals.
10. CRM will start to explore enhanced realities. Cutting-edge technologies that involve enhanced realities, notably virtual reality (VR), augmented reality (AR), and mixed reality (MR), are still in their early days, but the future of CRM has room for them all. The foundation was laid in 2016 with the Pokémon Go game, which inspired consumers and businesses alike to take notice. While the use cases for AR are still a bit narrow, more widespread adoption isn’t far off.



## INDUSTRY REPORTS ON PLAYERS

### THE FORRESTER WAVE™: CUSTOMER INSIGHTS SERVICES PROVIDERS, Q4 2015

Eleven service providers (Acxiom, Ansira, Epsilon, Experian Marketing Services, Harte Hanks, Merkle, Precision Dialogue, Rapp, Targetbase, Wunderman, and Yes Lifecycle Marketing) were researched and evaluated after being selected based on two distinct customer insight buying scenarios: database operations and engagement strategy.

Overall, Wunderman and Merkle were evaluated as leaders in database operations and as strong performers in the engagement strategy category.

#### **Merkle:**

- Within the customer engagement strategy space, Merkle cited as having some of the most satisfied clients in the review, and its application of behavioral economics principles was cited as making its business strategy offering one of the best in the study.

## **THE FORRESTER WAVE™: CRM (CUSTOMER RELATIONSHIP MANAGEMENT) SUITES FOR ENTERPRISE ORGANIZATIONS, Q4 2016**

Forrester used 36 criteria to evaluate CRM suites for enterprise organizations. Eight vendors (Infor, Salesforce, SAP, Microsoft, NetSuite, Oracle, PegaSystems, Salesforce, SAP, and SugarCRM) were researched and evaluated. Oracle, Salesforce, Microsoft, and PegaSystems led the pack., and like others in the report were included in the evaluation for having a strong CRM suite and product integration within the suite, being suitable for enterprises with complex needs, supporting multiple industries, and having a solid install base.

## **THE FORRESTER WAVE™: ENTERPRISE MARKETING SOFTWARE SUITES, Q2 2016**

When limiting the scope to marketing, Forrester used 40 criteria to evaluate providers of enterprise marketing software suites (EMSS). Forrester defines EMSS as “an integrated portfolio of marketing technology products that provide analytics, automation, and orchestration of insight-driven customer interactions to support inbound and outbound marketing.”

In this Wave™, Forrester evaluated Adobe, Experian Marketing Services, IBM, Marketo, Oracle, Salesforce, SAP, SAS, and Teradata marketing applications. Adobe, Oracle, and Salesforce led the pack.

# 4

# PBM PARTNER CONSIDERATIONS

A robust PBM-driven enterprise approach requires technical solutions, solution integrators, and services providers, each serving in different roles. While a single partner may fill multiple roles, brands must balance the need for cohesion across selection, implementation, and use of PBM capabilities, with the need for multiple highly specialized partners.



## PBM PARTNER CONSIDERATIONS

### BUSINESS INTEGRATION SERVICES

Integrators provide strategic counsel, such as vendor-agnostic advice and expertise during the selection process. They offer more tactical support for the implementation and integration of disparate tools. While certain firms or companies can play multiple roles, many organizations engage multiple integrators to solve for different challenges.

- Business integrators, or consultancies, typically focus on transformative aspects of PBM solutions. This includes change readiness and management, process redesign, and benefits realization planning.
- Systems integrators require more technical and functional knowledge in the space to properly configure tools. They typically have deep knowledge of how the tools are used day-to-day within the industry (and usually within the specific programs and campaigns being executed). Strong partnerships with the end users (internal and/or partners) is ideal so that tools are implemented with real-life applications in mind.

#### **Business integrators should exhibit the following characteristics:**

1. A strong partner will have a methodology, process, and rigor in place to meet your needs. Depending on those needs, it may include not just implementation, but also value/benefits realization planning, process design or redesign, and change management services.
2. They will also ensure that the solution is actionable for the organization's specific needs. A good partner will start with modern marketers that have experience using data, analytics, and insights to drive direct marketing offline and online. They must also have knowledge of traditional direct marketing methods and platform marketing in the digital space. This combination is crucial. Should an organization use a system integrator that does not possess marketing knowledge, closely partnering with end users is non-negotiable.
3. A strong delivery team (remember to meet your delivery team, not just your sales team) has a combination of functional knowledge and deep subject matter expertise, as well as experienced program management and solution design capabilities. Most critically, marketers who will be using the tools, making decisions, and activating audiences must comprise a combination of technical, analytical, and marketing specialists and generalists as a recipe for success are key. The combination of specialists (on the technical, analytical, and marketing sides) and generalists is a recipe for success.



## Solution Providers

Continued consolidation in the PBM market would lead one to believe that the selection of PBM tools is becoming simpler. But selection can be complicated, due to the rise of point solutions, the availability of software as a service (SaaS), and the difficulty in deciphering what solutions really are integrated into a larger suite make selection complicated.

To select the right tools, and to do so efficiently:

1. Organizations must start with a business understanding and articulation of marketing needs. Rather than focusing purely on functionality, consider the use cases, proofs of concept, and/or pilots that the organization wishes to support near term and longer term.

2. Develop an overall, strategic blueprint of the entire PBM technology ecosystem. It should include components from both the marketing and advertising technology sets. This high-level blueprint does not need to be perfect and will change as discussions occur with solution providers. It exists to demonstrate the interrelationships between functional components and helps the organization by preventing myopic decisions that suboptimize technology components.
3. Narrow the consideration set, but then go deep in the evaluation. The best way to create a swift selection process is to start with three or four of the top candidates for consideration, and share your burning platform business objectives and use cases with them. Be specific, so that they can address your detailed needs – and so that you can challenge your vendor without getting caught up in vagueness.
4. Don't be afraid to engage a vendor-selection expert to run the process for the organization. Unless an organization can dedicate a cross-functional group of stakeholders to the effort, and have expertise in the space, it is a good idea to have a partner to help run the process. A good partner will keep an organization on track, challenge vendors, narrow the consideration set, and include key stakeholders.

## Agencies / Marketing Services Providers

Agencies are the end users of the tools, technology, and data, so having them involved from the beginning of PBM implementation or enhancement is ideal. The right agency is in the optimal position to articulate business needs, develop use cases, and inform requirements. Of course, once systems are in place, the right agency partner will leverage the system to deliver world-class performance.

1. Agencies with data and analytics in their DNA are best, because the use of insight (rigorous use of first- and third-party data for modeling) to inform audience selection and treatment, as well as performance measurement, is at the heart of modern PBM.
2. Agencies must also understand and deliver on omni-channel journeys. Selecting best-of-breed service providers for each medium/channel leads to inefficiencies because, ultimately, your brand should manage audiences, not media.
3. Performance media and creative planning, execution, and measurement across digital (and offline) are also of utmost importance. However, expertise in each medium, channel, and platform is not enough. The ability to drive results at scale based on people-based insights and activation is a must-have.
4. Finally, partners that have adopted a philosophy of starting small, while testing into bigger strategic solutions deliver many benefits. First, this approach helps brands generate value quickly (compared to a “big bang” approach) by delivering iteratively over time. Second, it protects stakeholders from the risk of losing support because proven value can be projected to the larger-scale business case.

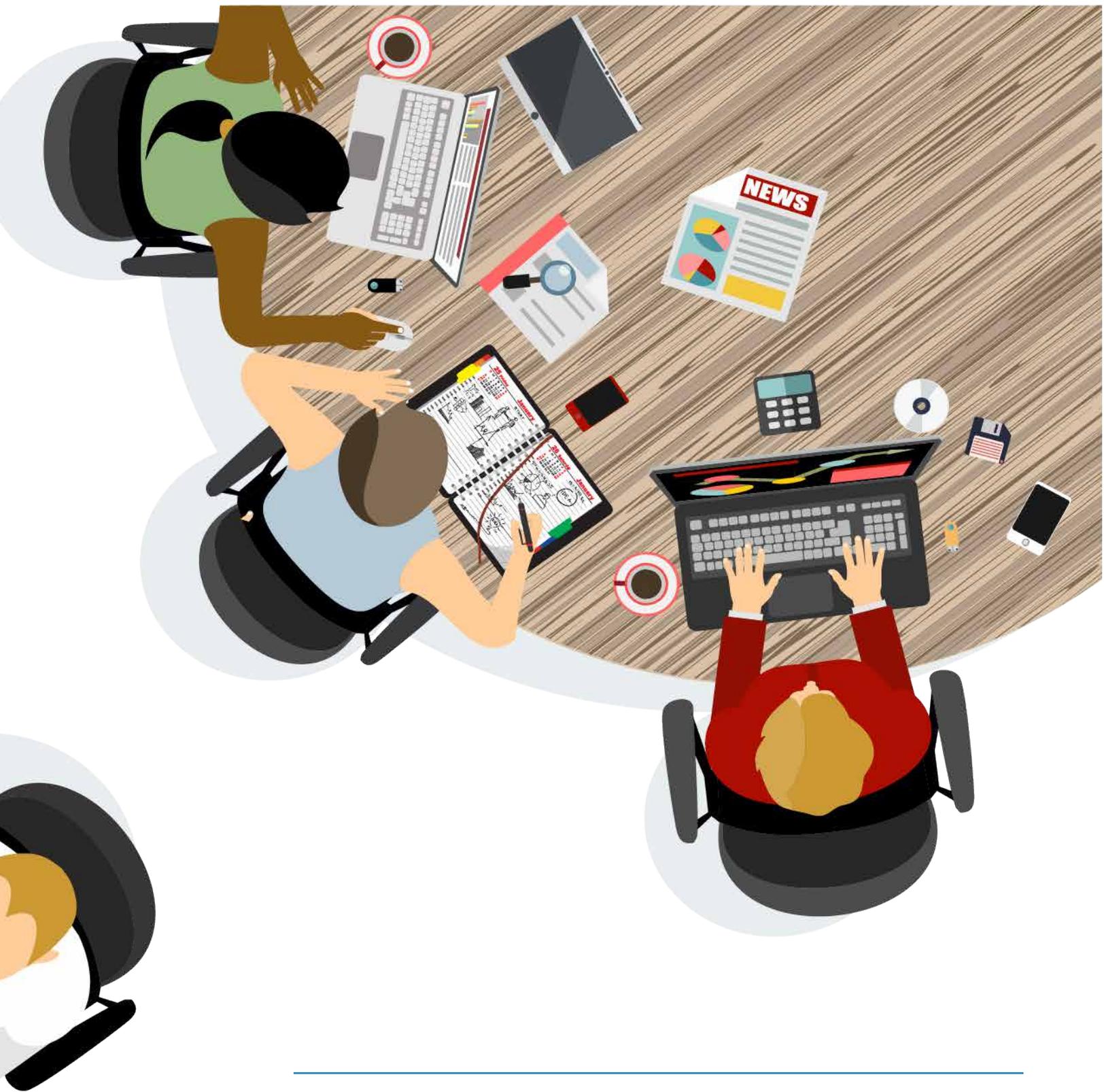




## CONCLUSION

Keeping up with modern marketing can be daunting, but a clear understanding of the business among the right partner(s) leads to success. The right partners can plan, build, and run PBM solutions and services across customer strategy, performance marketing, and marketing enablement. 2017 continues to promise the ability to deliver individualized marketing experiences, but this is only possible among organizations that take action. Those that are at the forefront will win the customer.





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## ABOUT THE AUTHOR



### **Leah van Zelm, Vice President, Strategy and Planning, Merkle**

Leah is a CRM and marketing veteran with experience leading strategic efforts, implementing marketing initiatives, and mobilizing organizations. In her current role, Leah's focused on influencing consumer decisioning through customer-centric experiences to drive profitable growth for businesses.

Leah's work benefits from sound knowledge in consumer insights and segmentation, journey mapping, measurement, product positioning, business case development, CRM process and organization design, roadmaps and implementation, communication planning, and program management. In her 11 years with Merkle, Leah has worked with retail, media and entertainment, insurance, banking, travel, telecom, nonprofit, and B-to-B companies.

Prior to Merkle, Leah spent five years in Accenture's CRM practice. During her tenure there, she helped a marketing service provider design offshore operations; developed segmentation and associated acquisition and retention programs for a leading mobile phone provider; contributed to the transformation of a leading telecommunications company around customer centricity; and helped launch a data mining company by supporting both the go-to-market plan and operating model design. Leah holds a BA and an MBA from the University of Texas at Austin and currently resides in Denver with her husband and two children (and dog, two cats, and hedgehog).

## ABOUT MERKLE

Merkle is a leading data-driven, technology-enabled, global performance marketing agency that specializes in the delivery of unique, personalized customer experiences across platforms and devices. For more than 25 years, Fortune 1000 companies and leading nonprofit organizations have partnered with Merkle to maximize the value of their customer portfolios. The agency's heritage in data, technology, and analytics forms the foundation for its unmatched skills in understanding consumer insights that drive people-based marketing strategies. When combined with its strength in performance creative and media, Merkle creates customer experiences that drive improved marketing results and shareholder value. With more than 4,100 employees, Merkle is headquartered in Columbia, Maryland with 16 additional offices in the US and 8 offices in Europe and Asia. In 2016, the agency joined the Dentsu Aegis Network. For more information, contact Merkle at 1-877-9-Merkle or visit [www.merkleinc.com](http://www.merkleinc.com)



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