

Campaign Management Assessment

Rising customer expectations

Intensified competition

Cost pressures

All of these continue to drive businesses to invest heavily in technologies that enable effective cross-selling, up-selling, and retention strategies—ultimately enhancing customer value and profitability.

Campaign management technology is essential for brands to maximise customer relationships and optimise the efficiency of their marketing operations and campaigns.

As user needs evolve, so too has the sophistication and variety of software tools available. Campaign Management Software (CMS) now ranges from basic outbound email capabilities to advanced, self-learning decision systems that seamlessly coordinate messaging across both inbound and outbound channels.

This market maturation offers businesses a broader scope of functionality and vendor options. However, selecting the right supplier and navigating the complex technology landscape remains a challenging task without a clear understanding of the requirements and necessary support.

Thorough planning and a deep understanding of the investment are crucial to avoiding costly pitfalls—such as failed implementations or systems that fall short of delivering promised benefits or adapting to your business's evolving needs.

When chosen wisely and implemented effectively, the right CMS can significantly enhance your bottom line, driving transformational gains in profitability.

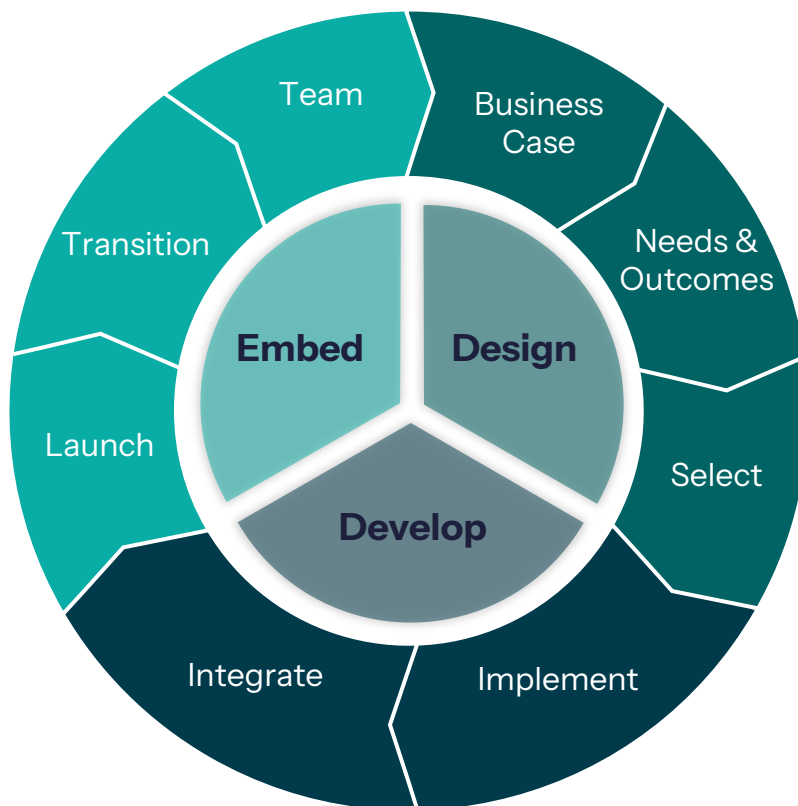
CLARIFY YOUR CUSTOMER STRATEGY

It's hard not to be blown away by the capabilities of some of the software on the market and the all-singing-all-dancing functionality on offer.

However, make sure that decisions about solutions are driven first and foremost by business requirements and customer strategy rather than technical capability.

Ask yourself:

1. What do you want to be able to do that you can't do now?
2. What is the intended customer impact and therefore, which commercial levers are you affecting?
3. What is the 'art of the possible' from the technology? However, this should only be in the context of defining your customer strategy.



DEFINE A BUSINESS CASE

What tangible, incremental value will this technology investment deliver from both a commercial perspective and its impact on customers, including metrics like NPS that can further translate into positive commercial outcomes?

To do so effectively requires a clear understanding of the key commercial levers and customer value management strategies.

The primary business benefits from campaign management typically stem from enhancing customer value—such as reducing attrition and churn, increasing share of wallet, and driving up-sell opportunities.

Cost control (e.g. discounts) is another significant advantage provided by this technology. While often associated with outbound and inbound marketing, tools like an "inbound deal calculator" can support customer service teams by setting deal parameters during negotiations, such as insurance renewals or mobile phone upgrades.

Identify how the program impacts key performance indicators (KPIs).

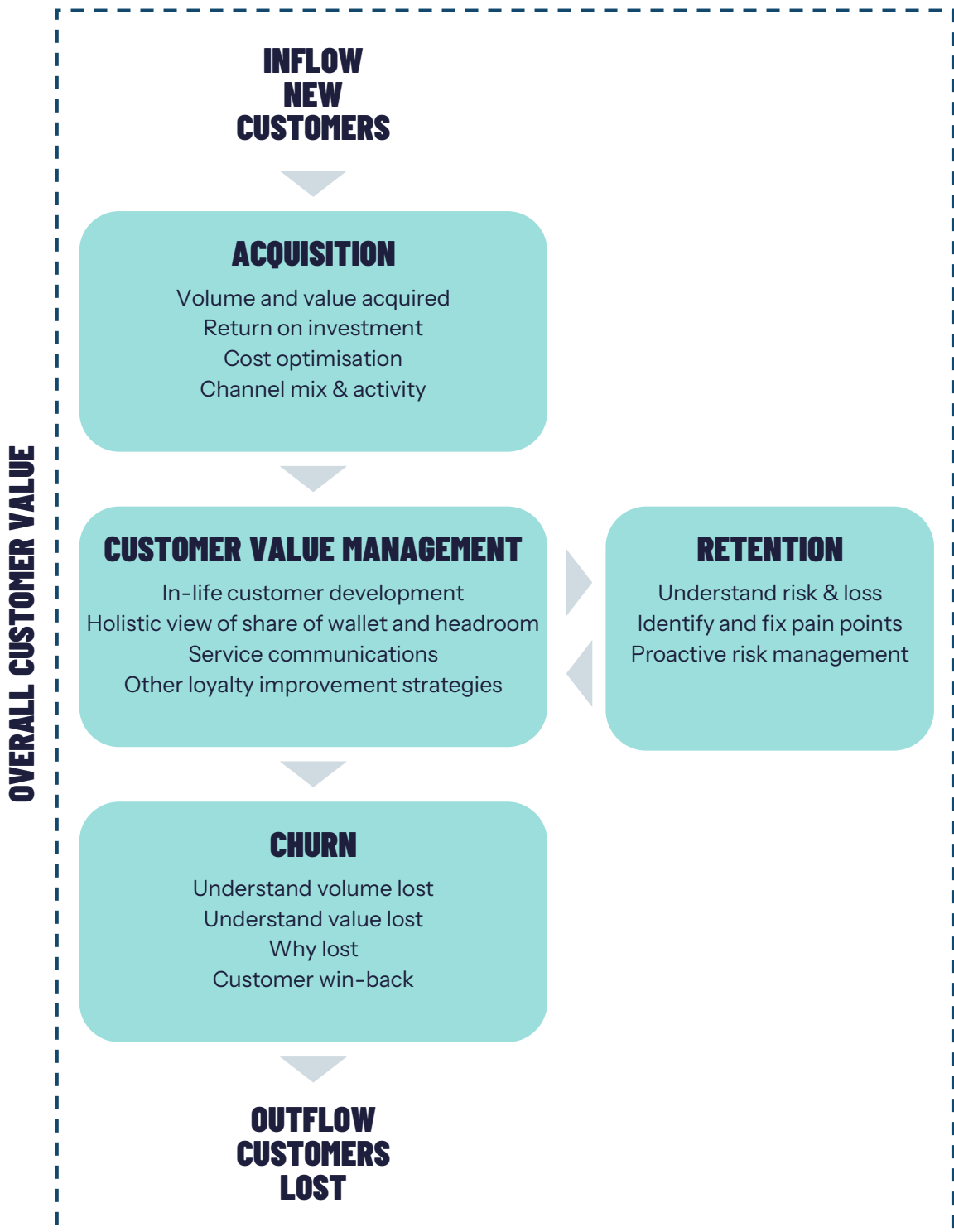
E.g., what would a 1% improvement in cross-sell or customer retention mean for the bottom line?

Carefully consider the specific customer journey impacts to be achieved — such as which cross-sell pathways you intend to optimise.

Ensure confidence in your business case assumptions and clearly define the expected commercial value over a timeframe relevant to your business.

This strategic approach will help you accurately measure success and ensure your investment delivers lasting benefits.

EXAMPLE FRAMEWORK: CUSTOMER VALUE MANAGEMENT



UNDERSTAND END-TO-END-CHANGE

While technology plays a pivotal role in executing customer strategies, it is only one component of a broader framework for successful marketing campaigns. Achieving success requires a holistic view of all contributing elements before delving into specifics. The following factors must be carefully considered at the outset of any project:



Design

Although each organisation has unique needs, most requirements fall into common capability areas. Developing a high-level design of end-to-end systems and integration points is crucial at this stage. Engaging an experienced advisor can help shape the target solution and define clear requirements.

The complexity of the solution will influence the RFI (Request for Information) or RFP (Request for Proposal) phase, during which potential vendors are evaluated. The RFP process, culminating in final presentations from shortlisted suppliers, integrates with procurement to negotiate terms.



Embed

Transitioning to BAU is a critical yet frequently overlooked phase. Designing a robust operating model and transition plan is essential. This phase involves identifying new roles and the critical skills needed to sustain the transformation. Building a capable team and recruiting the right talent is not merely a 'nice-to-have'; it is essential for realising the planned value.

A well-prepared BAU phase accelerates the benefits outlined in the delivery plan and reduces the overall cost of delivery and ongoing support.



Develop

Successful implementation hinges on having flexible resources with a balanced blend of skills to build, integrate, and launch the system effectively. Deployment teams should consist of experienced professionals with expertise in systems integration, data architecture, and customer strategy.

Remember that project timelines are context-specific and dependent on infrastructure—cloud-based solutions, for instance, often differ from on-premise equivalents in their deployment scope and duration.

SELECT THE SOLUTION

The software selection process must be meticulously planned to address both current and future needs, progressing through stages such as RFI (Request for Information), RFP (Request for Proposal), and POC (Proof of Concept) as appropriate.

Critical factors include architectural design and integration with your organisation's existing and future data architecture.



Business Functionality Requirements

Your business functionality needs will vary based on factors such as your industry sector, the complexity of your operations, the size of your customer database, and the range of channels you use.

While every organisation's requirements are unique, most will need to consider some, or all the key features listed overleaf. Not all functionalities may be delivered by a single tool but could be addressed through integrated solutions.

Delivering on the Business Case: Critical Commercial Drivers

Clients typically focus on three to five mission-critical use cases that underpin their internal business case and drive measurable benefits. These use cases are often more valuable than an exhaustive list of product features and should be clearly defined within the RFP. Selecting a partner with both commercial insight and technical expertise is essential. If a Proof of Concept (POC) is needed to compare vendor approaches, ensure it is realistic, commercially relevant, and included in the RFP.

Requirements Gathering: A Reality Check

Attempting to define a comprehensive set of detailed requirements can be time-consuming and may not always yield the best outcome. In practice, most advanced vendors will cover the core functionalities required by established markets. Additionally, requirements gathered from current users often reflect the present state rather than future aspirations.

Meaningful investment in campaign management software is guided by customer strategy, vision, and commercial drivers. While detailed requirements are useful, understanding how each vendor addresses commercial value management scenarios and use cases is critical. Vendors demonstrating clear alignment with your business objectives will ultimately stand out.

FOCUSING ON WHAT MATTERS

Success hinges on prioritising what is truly important rather than documenting every minor requirement. Using a scorecard approach, evaluate vendors based on key functional and non-functional areas, such as:

- **Business Functionality Capabilities:** Approximately 10–15 key functional areas
- **Analytical Capabilities:** Tools and methodologies for data analysis
- **Technical Architecture:** Integration with existing systems
- **Commercial Value Use Cases:** Preferably industry-specific
- **Vendor Vision:** Confidence in upgrade paths and new features
- **Skill Availability:** Market expertise for ongoing operations (BAU)
- **Total Cost of Ownership:** Beyond software costs, consider the full lifecycle cost
- **Track Record:** Previous client successes and challenges faced

Key Features

Batch Campaign Management launches campaigns targeting specific customer groups at predetermined times.

Real-Time Inbound Marketing enables consistent delivery of the right message at the right time across all inbound channels, including digital platforms, customer service centres, and retail stores.

Channel Definition covers inbound and outbound channels, as well as social media and published content, ensuring comprehensive campaign reach.

Integrated Data provides a single, unified view of the customer, enhancing marketing efforts through consolidated insights.

Permissions and Channel Preferences ensures promotional offers align with customer preferences, delivering relevant communications while preventing unwanted messaging.

Integrated Modelling and Targeting allows data modelling and customer segmentation directly within the tool for more precise targeting.

Negotiation Optimisation supports customer service advisors during negotiations, such as renewal discussions, by optimising deal parameters and improving outcomes.

Reporting and Impact Assessments includes advanced reporting capabilities and control group strategies to measure campaign effectiveness and ROI.

Lead Management to guide non-customer leads effectively through the sales funnel and enhancing conversion opportunities.

Rewards and Loyalty Platform Integration facilitates seamless integration of rewards programmes and loyalty initiatives with your overall marketing solution, ensuring cohesive data and communication strategies.



ASSESSMENT SCORECARDS

A scorecard approach is an objective, systematic framework for assessing vendor capabilities against business requirements to make informed decisions. To create and use a scorecard approach:

- 1. Identify** the most critical factors for vendor selection based on your business objectives and requirements.
- 2. Assign** relative weights to each criterion based on its importance to your business, e.g. if data security is a top priority, you might assign it a higher weight than pricing.
- 3. Evaluate** each vendor against each criterion on a numerical scale (e.g., 1-5), documenting the rationale for each score, providing specific examples or evidence to support your assessment.
- 4. Multiply** each vendor's criterion score by its weight, then sum the weighted scores to determine the overall vendor score.
- 5. Compare** overall scores across vendors to identify top contenders, analysing reasons for differences in scores to gain insights into strengths and weaknesses.

For example:

	Example criteria (can be weighted)	Existing solution	Upgrade existing solution	Solution A	Solution B	Solution C
Functional	Depth of functionality	1	2	5	4	2
	Product maturity	1	1	5	4	2
	Tactical or emergency campaign turnaround	3	3	5	3	2
	Time to implement	5	5	4	4	1
	Integration with existing capabilities	5	5	3	3	3
	Inbound channel capability	0	0	4	3	2
	Additional data source import/mapping	1	1	5	4	1
Non functional	Opex / capex required	4	2	4	2	2
	Availability & expense of developers	3	3	4	2	2
	Cloud based	0	0	3	3	4
	Tool time to competence for new users	3	3	3	3	2
	Score (percentage)	26 (47%)	25 (45%)	45 (81%)	35 (63%)	23 (42%)
	Fails	5	6	0	2	9
	Overall assessment	3	3	1	2	3

Match to requirement: 0 None / 1 Poor / 2 Partial / 3 Close / 4 Good / 5 Exact/complete

MANAGING AND RUNNING THE IMPLEMENTATION

Effectively managing and executing an implementation project is more complex than it may initially appear. Brands must anticipate potential pitfalls from the outset and proactively address risks—not just from a technology standpoint, but also in terms of data management and governance.

A critical focus is creating an operational model that can smoothly handle the transition and identifying the skills required for the permanent team that will manage the solution long-term.

Successful implementation of campaign management systems involves broader business engagement beyond the CVM/CRM team:

IT Infrastructure and Support:

IT plays a crucial role in defining infrastructure service level agreements (SLAs). Establish clear processes for resolving technical issues promptly and efficiently.

Data Management and Governance:

Secure and compliant data flow from the marketing database into the system is essential. Ensure data management protocols meet governance and regulatory standards to avoid potential risks.

Channel Management:

Consider the implications of using inbound capabilities. Training and staff incentives may need adjustment, and responsibilities for content and creative messaging must be clearly defined—whether managed in-house or by external agencies. Integration with broader marketing communications (marcomms) strategies is also critical.

Cross-Departmental Engagement:

Beyond the marketing and CRM teams, other departments will be involved. For example, commercial finance teams play a role in tracking KPI performance and measuring value. They help assess whether the project delivers on its business case and provide input on customer investment models and pricing strategies.

Product and Segment Prioritisation:

Align commercial priorities with segment-specific considerations. Determine which segments offer the most value to the business and ensure implementation efforts reflect these priorities.

OUR RECOMMENDED APPROACH



Discover

Using our own maturity model, we can assess opportunities in your customer strategy or focus on specific areas of challenge or opportunity that the client has already identified. Part of this is typical mapping the as-is-across customer value drivers, your customer interaction plan and channel delivery/ personalisation.



Recommend

Based on the value drivers, we can design strategy to capitalise on the identified opportunities. This can be at a high level, or a detailed solution level as required. This is 'use case' driven, aiming to deliver recommendations with tangible commercial benefits.



Prioritise

Within recommendations there will always be a range of benefits and costs. We will help drive out the prioritisation of quick wins versus longer term capability. We can also help build benefits cases in more detail for investment sign off if required.



Roadmap

The interlock with other areas of change within the organisation is critical. Particularly in the data management and marketing automation area, upstream change can impact plans. We can help you plan the delivery roadmap.



Deliver

We can resource a bespoke team for you to move through delivery, including experience business change leads to drive the overall programme. Typical skillsets span all areas to deliver change – from data to marketing automation.



Embed

Almost all business change requires a focus on 'people' and 'process' elements. At the very least change in data and insight capability from a technology or strategy point of view, requires new people after it has been 'delivered' to run the capability. As well as organisation & operating model design, we have an extensive resourcing capability that enables you to put permanent team changes in place.

WE ARE HERE TO HELP YOU

Our aim is to grow our client's customer value. We help brands organise and use data to make decisions and automate technology to execute them.

The core principles of being customer and insight led have not changed, but there's been a rapid change in technology and the art of the possible.

This has huge implications for the capability needed in an organisation – from marketing right through to technology, data and people.

We're not just consultants; we've sat your side of the table working for some of the biggest brands across the world and faced the same challenges as you are today.

That's why we've designed a business around delivering & embedding real change that sticks, not just imparting theory.

It also means we are best placed to offer direct expertise and build teams of practitioners to help you realise your opportunity based on practical experience – and support for the whole journey if you need it.



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