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LEAD GEN 2.0:

THE RISE OF INTENT MARKETING

BEST PRACTICES FOR DATA
AND PERSONALIZATION



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DMN



TABLE OF CONTENTS

3	Part One: Understanding Personalization At Scale
4	Understanding Personalization At Scale
5	Putting Personas Into Context
6	AI And Contextualization
7	Finding A Balance
8	Part Two: Leveraging Data For Intent
9	Psychographics: The 'Why' Behind The Buy
10	Building Psychographic Profiles
11	Case Study: How Brands Leverage Intent
12	Part Three: Measuring Intent
13	Measuring Intent
14	A Closer Look: Time-Based Attribution
15	Recap: Intent Marketing Checklist

What is Intent Marketing?

Intent marketing is the practice of identifying, engaging, and connecting with consumers (B2C) and prospects (B2B) based on how likely they are to buy your product or service.

The backbone (and ultimately, the goal) of intent marketing is understanding your audience well enough to create a one-to-one relationship with your buyer. This means broad buyer personas just don't cut it anymore. Qualifying leads goes beyond casting a wide net, focusing instead on levels of engagement.

According to Salesforce, more than half of consumers expect brands to anticipate needs and make product suggestions before a customer engages. Studies also suggest that consumers are more responsive to content that speaks directly to their user intent.

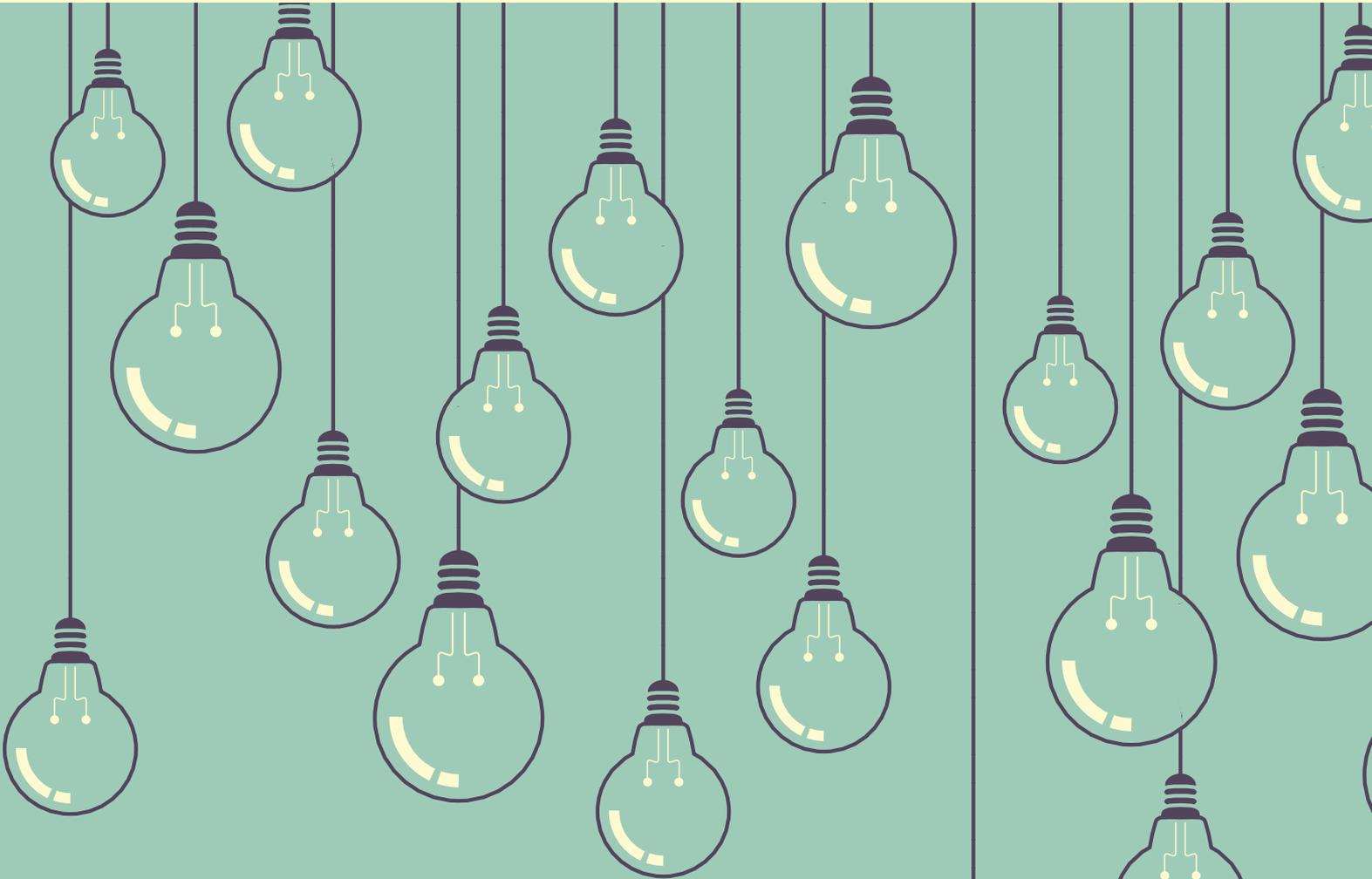
Achieving a personal connection, which is key to intent marketing, requires a deep understanding of the consumer — from where they are in their customer journey, to the types of content they want to engage with, to how they want to engage with your brand.

For B2B marketers, this means profiling known individuals at accounts you're familiar with, but more interestingly, developing swift — even real-time — profiles of unknown prospects who are just starting to seek out your content. For B2C marketers, this means anticipating consumer habits based on a combination of psychographic, demographic, and real-time data.

With the help of machine learning, organizations can track, measure, and engage consumers by delivering highly-personalized content throughout every stage of the customer journey. Given marketers have the right data available, predictive modeling can help anticipate what consumers need — and where they're going next — ahead of time.

In this eBook, we're taking a closer look at some of the fundamentals of intent marketing, and how organizations can redefine their strategies for a more personalized approach to lead generation.





PART ONE

UNDERSTANDING PERSONALIZATION AT SCALE



UNDERSTANDING PERSONALIZATION AT SCALE

Creating intent-based customer experiences requires marketers to develop a deep understanding of the types of people consuming and interacting with content and campaigns. With the help of technology, building personas has moved beyond the traditional ‘cookie-cutter’ approach in several ways:

- ⊛ Marketers can now leverage a wealth of information to create dynamic customer profiles, grounded in a blend of comprehensive first and third-party data
- ⊛ Customer profiles can be segmented, with the ability to focus on identifying moments of intent in realtime, for different audiences, at scale
- ⊛ Lookalike profiles can be used to identify new prospective audiences, giving teams the opportunity to target outbound marketing efforts more effectively
- ⊛ Lookalike profiles can also be used to offer similar products or services to repeat buyers

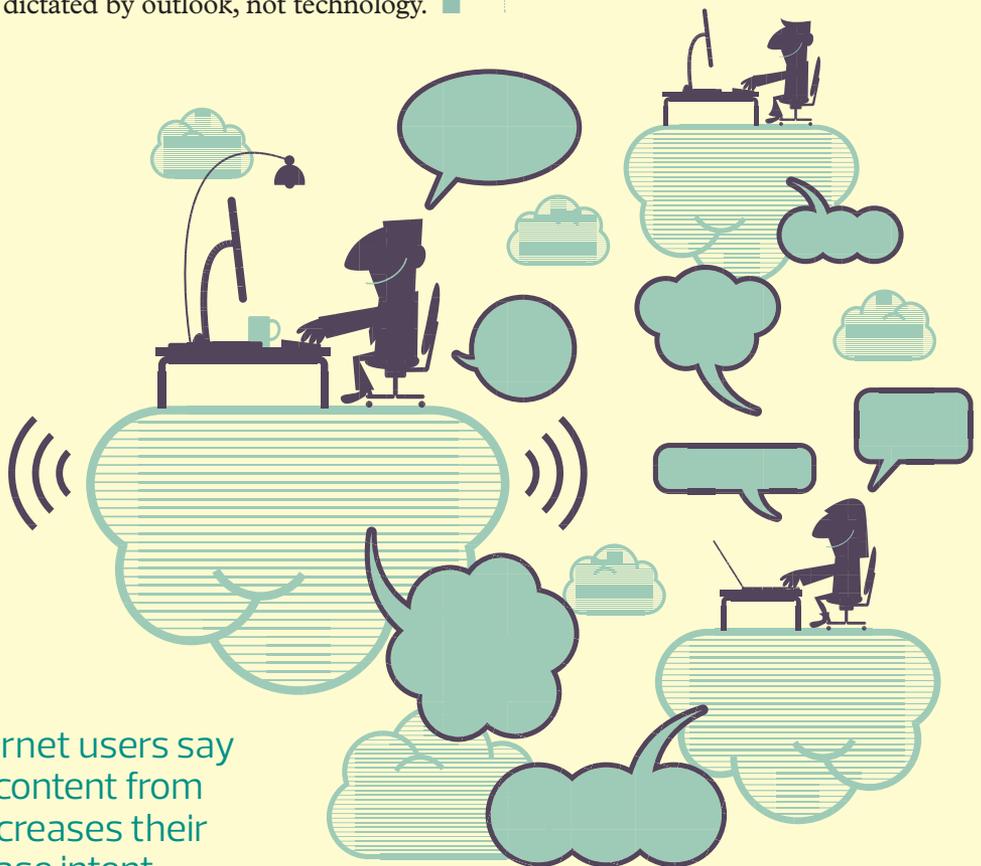
The goal is to not only understand the needs of your audience, but to put those needs into the context of their everyday lives.

Many of the technological building blocks we see today have been used for years in attempt to reach individuals – with growing sophistication. A personalization solution depends on a combination of machine learning, artificial intelligence, and a team that can determine how the solution is applied. How people interact with these systems, and what results they obtain, will vary somewhat from solution to solution. And sometimes, those approaches are dictated by outlook, not technology. ■

51%

of consumers say they expect companies will anticipate needs and make suggestions on products or services before they make contact

(Salesforce)



78% of U.S. Internet users say relevant content from brands increases their purchase intent

(Marketing Insider Group)

PUTTING PERSONAS INTO CONTEXT

For Kevin Lindsay, director of product marketing for Adobe Target, the difference is “contextualization,” which should take personalization to the next level. Efrat Ravid, chief marketing and strategy officer, ContentSquare, agrees.

“Intent on its own is vastly important, but it doesn’t give you the full picture of user experience. Who your user is (persona) and the circumstances they find themselves in (context) will also impact their behavior and ultimately, whether that intent or objective is fulfilled,” Ravid said.

Lindsay offered one example. “Selling shoes. It is not a big risk if you show a pair of women’s shoes to a man.” That mistake probably won’t offend, yet an automated system can make this error if the data adds up a certain way.

“Understanding patterns of behavior a user might display in different contexts is vital to creating an experience that will resonate,” Ravid said. “Understanding expectations means of course understanding user intent or, in other words, the consumer’s goal once they enter your interface. This could be to buy, but it might be something else also. For example; a consumer may simply want to connect with a brand, do some window-shopping, create a wish list, find a store locator, etc.” ■

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“As with any marketing facet, it’s important to integrate intent with long-standing practices. Marketers should be aware of the “silo-effect” (which we’ve seen recently with digital integrations), and not keep intent isolated from other efforts.”

– Jeff Adeo, SVP, GM, B2B Media Solutions, Infogroup

Consumer buying behavior: The study of a consumer’s process, attitudes, and interactions when making a purchasing decision

Contextualization: To place something in “context,” or in a circumstance where an idea, event, or statement can be understood as fully intended



Read more:

[How ‘Fit’ Is Your Content Marketing Strategy?](#)

AI AND CONTEXTUALIZATION

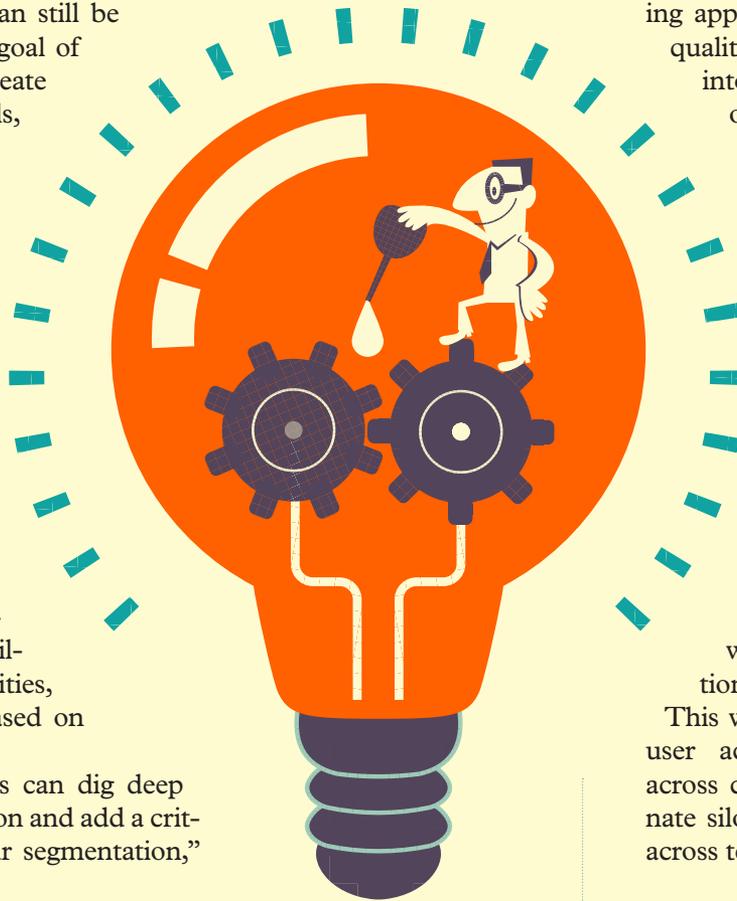
A group of individuals can share a set of interests. But how you reach each person, and with what, can still be unique. Although the goal of personalization is to create unique experiences for individuals, that experience does not have to be 100 percent unique to them.

The outreach is custom-made, while the components of that outreach are catalogued and tapped as needed.

“Artificial intelligence can help design what is served and where,” Maribeth Ross, senior vice president, marketing, Monetate, said. It can choose from a library of stuff you already have. No human can do this in real time.”

For machine learning to work effectively, the right data must be available to identify the right opportunities, and make accurate predictions based on user intent.

“Next-gen, AI-powered analytics can dig deep into the nuances of digital interaction and add a critical layer of understanding to your segmentation,” Ravid said.



The success of machine learning applications depends on the quality of the data you feed into the system. Incomplete or inaccurate customer data can lead to inaccurate modeling, which, in turn, can make it more difficult for marketers to make the right decisions when it comes to creating campaigns.

The goal is to consolidate all individualized customer records into one complete customer ID, or have a data center where customer information can be readily accessed.

This will allow you to track all user activity and information across channels, and help eliminate silos for more transparency across teams. ■

WHEN EVALUATING YOUR DATA, KEEP AN EYE OUT FOR:

- ⊕ Duplicate records
- ⊕ Outdated information, like old email addresses, phone numbers, last names, or work locations
- ⊕ Updates in user preferences or opt-in information

Predictive modeling: The process of using statistics to accurately predict outcomes. For marketers, predictive modeling can help identify qualified consumers by testing different combinations of data points

Read More in our eBook: [How To Enrich Your Data To Win and Grow Customers](#)

FINDING A BALANCE

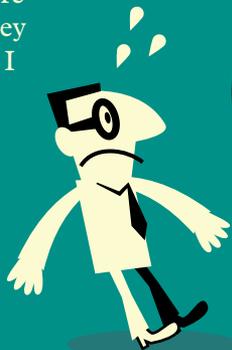
How marketers handle data for personalization also makes an impact — negative if they get it wrong, positive if they get it right.

Opting into personalization, and having a sales associate know you when you walk into a store, is good, Mark Abraham, principal of the Boston Consulting Group, said. But, if it happens without consent, it can be creepy.

InMoment's latest CX Trends Report shows that around 75 percent of consumers find most forms of personalization “somewhat creepy.” On top of that, 40 percent of brands admitted they felt their own communications were a little creepy, too.

Brennan Wilkie, InMoment SVP, customer experience strategy & country manager, Canada, says the biggest challenge for brands is to find that perfect balance.

“The ability to personalize allows a more personal connection with consumers — it’s the building blocks for more interpersonal relationships,” Wilkie said. “That’s where there’s real challenges — companies don’t realize when they cross the line. I



think it starts with self-awareness.”

For many companies, personalization is a when, not an if. While established brands may not be as far along as “digital natives,” they must find a way to adapt the technology to suit their customers’ needs. These solutions require brands to see their services as creating a customer experience.

“The buzzword today for digital interaction is ‘experience,’ and as we all know, there is no experience without feeling. Consumer journeys are essentially emotional,” Ravid said. “Digital disruptors are raising the standards for customer experience online, and as these experiences become more and more sophisticated, consumers have higher and higher expectations for seamlessness, uniqueness, and excellence.” ■

PERSONALIZATION IN PRACTICE:

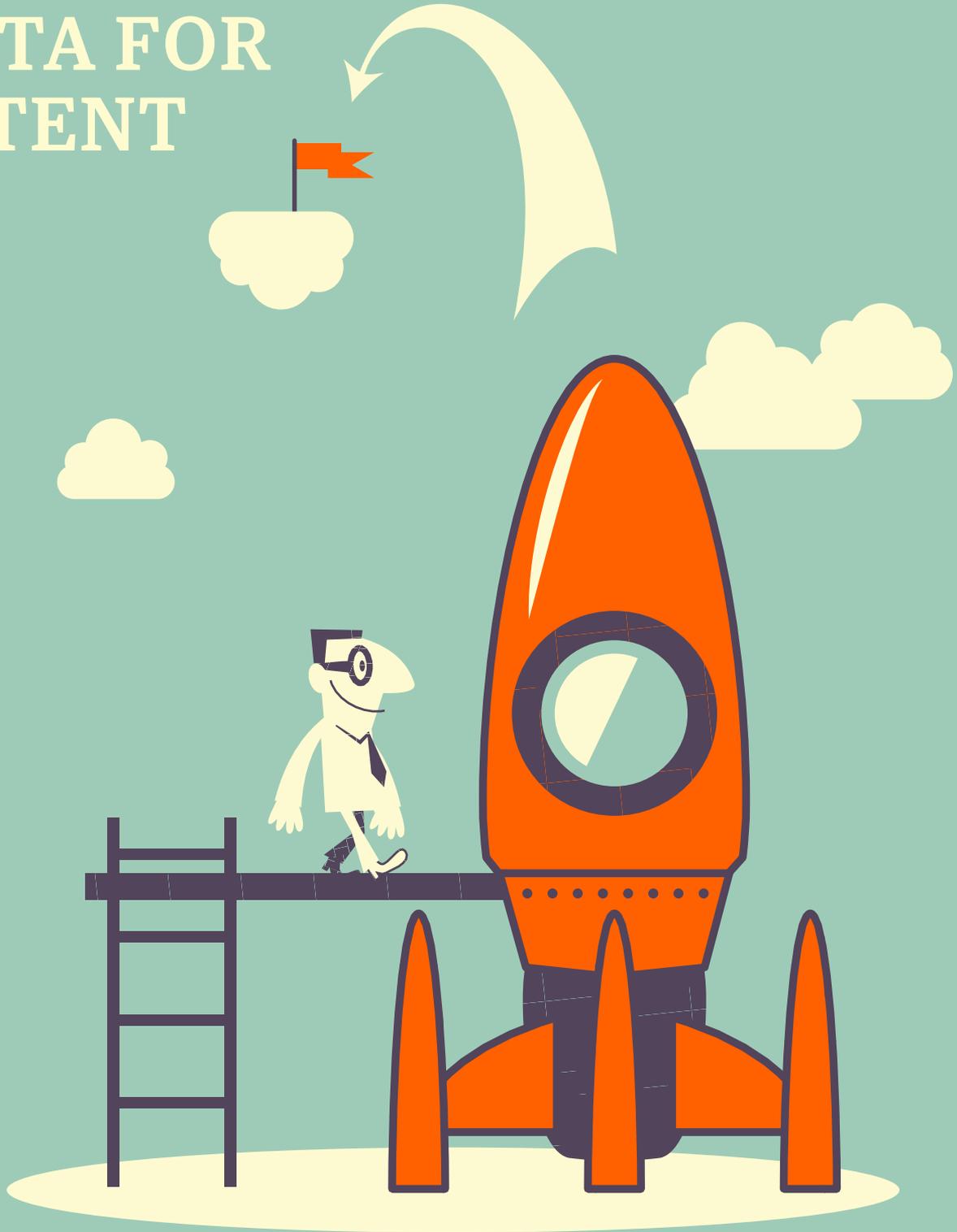
One general principle is to look for “pain points” in the transaction, then change the process to produce a convenience. For example:

- ⊗ Starbucks allows customers to pre-order from their smart phones while waiting on line, so coffee is ready by the time they get to the register.
- ⊗ Sephora uses augmented reality to allow users to “try” various shades of lipstick, using their picture or smart-phone selfie.
- ⊗ Office Depot used AI and machine learning to alter web pages delivered to customers, depending on where they were in the purchase cycle. This paid off, with a \$7 million sales gain in four months.

75%
of consumers find most forms of personalization “somewhat creepy”

PART TWO

LEVERAGING DATA FOR INTENT



PSYCHOGRAPHICS: THE 'WHY' BEHIND THE BUY

Psychoographics are a collection of data based on psychological criteria, like aspirations, hobbies, and values. These factors help marketers understand why consumers choose to make purchasing decisions, adding an extra layer of context to better understand and identify intent.

To find a group to sell to, you must separate groups into unique audiences. Asking divisive questions should produce distinct groups. Cross-check respondents with their purchasing histories, then develop marketing campaigns that respondents can relate to.

“Administer a series of questions designed to polarize responses,” Jeffrey Anderson, president of Jeff Anderson Consulting, said. “You bring the most-alike together, but significantly different from other groups.”

From a marketing perspective, “the flexible are early adopters,” Anderson said. They’re more likely to buy a new product. For rigid thinkers, “you have to prove it works for them. They do not take risks.”

“Psychographics provides a much-needed behavioral dimension which includes personality traits, activities, interests, and opinions,” Art Weinstein, professor of marketing at Nova Southeastern University, said. “While two individuals may appear similar demographically, they may think very differently, which will impact their personal decisions and purchase behavior. Good personas now go beyond demographics and incorporate lifestyle factors and behavioral preferences.”

Understanding and anticipating customer intent

Psychographics can help marketers tune in to real-time moments to anticipate customer needs. When combined with demographic data, psychographics can add an emotional touch to marketing campaigns, delivered at the exact moment customers may be in the market for your product or service.

For example, consider seasonal selling as a B2C brand. In warmer weather, consumer needs shift towards items like suntan lotion, or food and beverage purchases for barbeques. In the winter, consumers are in the market for coats, or snow supplies. By understanding those needs before the demand, marketers can stay ahead of the curve and generate interest early. ■

Demographics: Statistical data that generally includes age, gender, household income, location, etc. This data helps marketers predict how a person will discover and perceive a product or service

Psychographics: Information based on psychological criteria, like aspirations, hobbies, and values. These factors help marketers understand why consumers choose to make purchasing decisions



BUILDING PSYCHOGRAPHIC PROFILES

Surveys and focus groups are still useful tools for developing psychographic profiles. You can add AI, data mining, and social media analytics. But even here, limits exist, and judgment must be exercised.

Big data alone “doesn’t really answer the ‘why?’” Anderson said. Sometimes the data clusters overlap, and you have to go back and talk to people to find out why they felt that way,” he said. “I think it is a little complex for widespread use.”

April Mullen, director of consumer-first market adoption at Selligent Marketing Cloud, disagreed.

“Gathering data for psychographic segmentation is a laborious effort. It has traditionally been a luxury only to companies with heavy resources of both time and money. The use of AI and machine learning, though, will help lift some of the operational burden of analyzing responses and organizing segments,” she said. “Because of that, we’ll see



more applications of psychographic segmentation.”

Still, the gain is worth the pain.

“These companies are richly rewarded, resulting in a 24 percent increase in business performance compared to firms not using psychographics as a segmentation dimension,” Weinstein said. ■

INTENT IN PRACTICE: CONNECTING ON THE RIGHT CHANNEL

Psychographics can also help determine how your customers want to connect with your brand, which is beneficial for creating omnichannel experiences.

“Think of a personal example: you want to buy cat food. You’re not going to feel the same way or browse the same way if you’re doing this from the comfort of your couch on laptop versus if you’re doing this at rush hour on the subway platform from your phone,” Ravid said.

CASE STUDY: HOW BRANDS LEVERAGE INTENT

PatientBond is a cloud-based platform that crafts messages for patients undergoing treatment. The firm recently ran a program for the American Heart Association, identifying five different groups of patients with different health needs, and crafting unique outreach and messaging for each group.

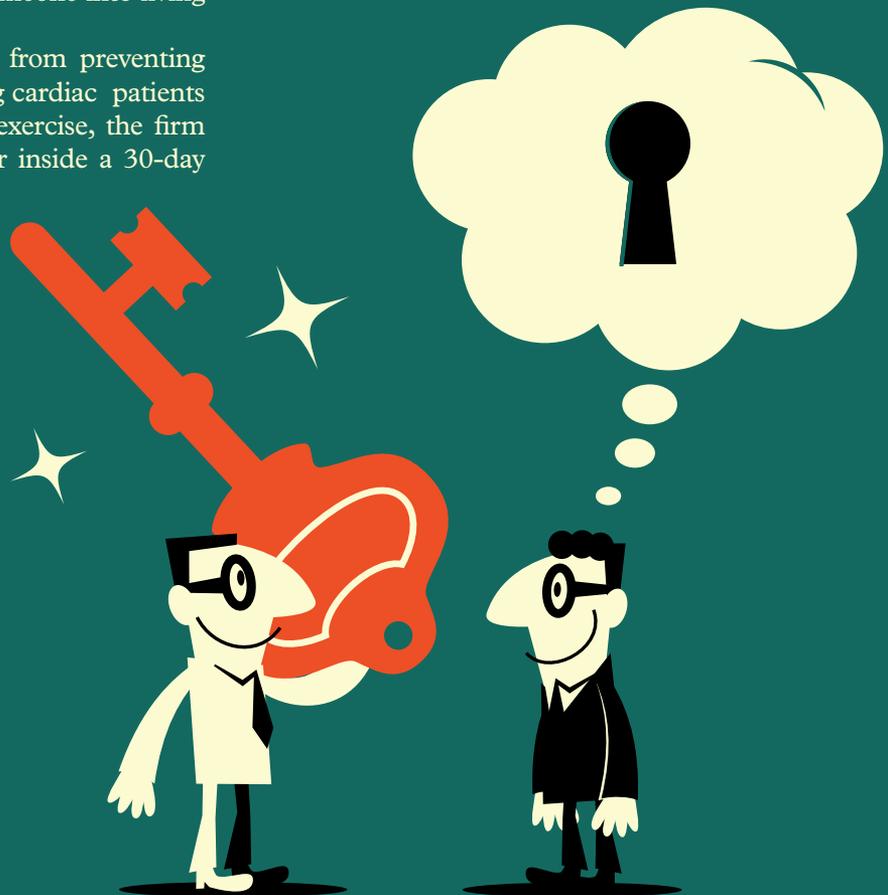
Segmentation was done through a simple 12-question test that takes about 60 to 90 seconds.

“You are framing a proposition to help them understand what you are asking them to do, on their own terms,” Brent Walker, senior vice president of marketing and analysis, PatientBond, said. “Psychographics is not manipulation...you are not tricking someone into living better.”

In PatientBond’s case, ROI results from preventing costs from being incurred. By reaching cardiac patients with useful information on diet and exercise, the firm hopes to cut re-admissions that occur inside a 30-day window — a hard hit for hospitals with diminished Medicare reimbursements.

So far, PatientBond has helped the American Heart Association cut 30-day re-admissions by about 80 to 90 percent, with each readmission costing anywhere from \$12,000 to \$30,000.

“Psychographics has captured the imagination of consumer marketers and most major research studies about customers now incorporate this approach into their analyses.” Weinstein said. To this end, psychographics can be a useful adjunct to the demographic approach marketers know so well. ■



PART THREE

MEASURING INTENT



MEASURING INTENT

Identifying purchase intent means separating out purchase behavior from other online behaviors. For example, a potential customer visiting a site and clicking through a few pages certainly counts as behavior, but it's a very weak signal when it comes to actual purchase intent.

The more data you have about a customer, the better chance you have of correctly scoring them on intent. Unlike traditional lead scoring, measuring levels of intent requires pulling individual-based data together to start scoring prospects on propensity to convert.

Essentially, you're putting a clear and measurable number on engagement levels. Traditional lead generation tactics call for attribution based on different touchpoints down the funnel. Propensity scoring creates a perpetual, non-linear customer journey. It's not about where they are, it's "who is in the market for my product or service right now?"

For B2C marketers, this can help pinpoint the most profitable opportunities for real-time campaigns, or remarketing opportunities. In B2B, there's more chance of doing it for individuals, which can be beneficial

for longer sales cycles, or for target accounts that may have more than one decision-maker in the buying process.

Predictive modeling can help anticipate which piece of content to serve next, and which (sales) action to take. Marketers will have a better understanding of where people are in their journey "as leads," and are able to predict – fast – what they need, and where they're going next.

Adding a layer of quantifiable psychographic data can also help improve and optimize content with additional insights on real-time needs.

"With actionable insights and customized tracking of KPIs like hesitation, frustration etc., teams can visualize underperforming content at an elemental level and optimize the experience so it meets the demands of today's fluid audiences," Ravid said. ■

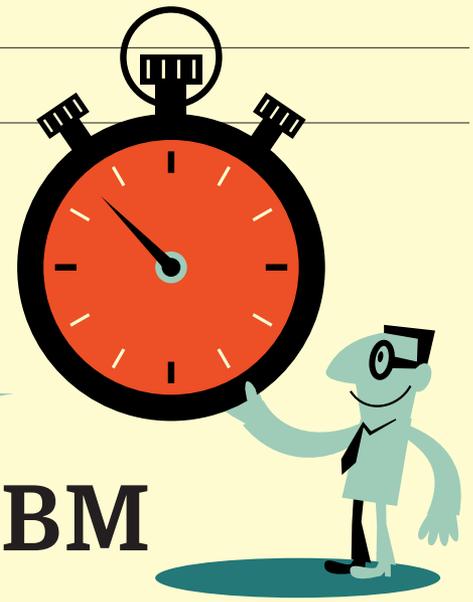
Lead Scoring: A methodology used by sales and marketing departments to determine the value of leads, or potential customers, by scoring them based on their behavior relating to their interest in products or services

Propensity Scoring: Scoring prospects on propensity to convert. It puts a number on intent, essentially. The more traffic you have coming to whatever content you're offering, from web pages to booths at a conference, the better your propensity modeling will be



Learn more in our webinar:
[The Changing Face of Lead Gen](#)

A CLOSER LOOK: TIME-BASED ATTRIBUTION AND ABM



Time-based attribution is the practice of determining intent based on the level of engagement (time spent) a customer exhibits with your brand, and/or interacting with your assets or campaigns.

Understanding how a customer is engaging with your brand can help determine where they are in the customer journey, and when they would be most likely to purchase.

“People will spend time with you before they spend money with you. So it’s about how to measure the time spent,” Brandon Redlinger, director of growth at Engagio, said.

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“Increased topic/content consumption or other indicators can help push prospects further down the sales funnel, but talent, data flow and systems must be in place to quickly monetize such intelligence.”

– Jeff Adeo, SVP, GM, B2B Media Solutions, Infogroup

These parameters are customized based on organizational goals, and how brands prioritize certain interactions across sales and marketing campaigns. Like traditional lead scoring, certain interactions – like an eBook download or a sales call – may have more weight than top-of-funnel interactions like reading a blog post, or visiting a product page.

In a time-based attribution model, different “weights” for lead scoring are measured in terms of engagement. For example: reading a blog post may count as five minutes of engagement time – whereas attending a webinar or taking a sales call may account for 30 minutes to an hour.

“An account could be considered ‘qualified’ if they have at least two key personas spend a certain amount of time engaging with the brand,” Redlinger said.

Different personas within accounts can also be weighted depending on how different organizations value certain leads. In this case, greater value would be attributed to the amount of time those designated leads spend engaging with content.

“In those cases, you can say ‘multiply that ‘minute’ by 1.5 times the traditional score,’” Redlinger said. ■

B2B: TRACKING ENGAGEMENT FOR ABM

Before you start tracking engagement, make sure you’ve selected the right leads and channels to start building campaigns.

“If you don’t have the right fit, then the engagement doesn’t matter,” Sangram Vajre, Terminus said.

Account coverage tracks how much data your organization has on select accounts, and how complete that data is. Make sure your company has identified all the major stakeholders involved in the decision-making process – and that you have the information to contact them in the most effective ways.

“Computers are better at integrating data at mass quantity, but they’re not good at building the relationship – only humans can do that,” Redlinger said. “Slow down and be more focused to deliver more value to the account.”

RECAP

INTENT MARKETING CHECKLIST

Now that we've gone through some of the basics of intent marketing, it's time to test the readiness of your own organization. Here are some questions your marketing team needs to ask as you put together your intent marketing strategy:

BUILDING PERSONAS:

- ⊕ Who is your ideal customer?
- ⊕ Do you have multiple personas, each with different needs?
- ⊕ Why is your ideal customer in the market for your product or service? What problem are they trying to solve, and how can you help them achieve their goals?
- ⊕ How can you use segmentation to create unique, targeted experiences?

UNDERSTANDING CONSUMER HABITS AND ENGAGEMENT

- ⊕ What products or services does your ideal customer interact with most?
- ⊕ When (seasonally, annually, ongoing, etc.) is your customer typically in the market for your goods and services? Is there a preferred time for engagement?
- ⊕ Are there similar products or services that could also meet their needs?
- ⊕ What products has your ideal customer interacted with in the past?

FINDING THE RIGHT CHANNEL:

- ⊕ Where are your customers interacting with your brand? In-store? Online?
- ⊕ Are they engaging on desktop, or through mobile?
- ⊕ Are they at home, or on-the-go?
- ⊕ How can you connect with customers at the right times, through the channels that make the most sense for them?



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“Marketers are at different stages with intent-based marketing. Some have intent data fully integrated into their marketing strategy while others are just getting started.”

- Jeff Adee, SVP, GM, B2B Media Solutions, Infogroup

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2

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3

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4

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5

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