



The 21-Day Fix For Real-Time Marketing

1.

Understand why you're implementing a real-time program, one that lets you stay "in the moment" with each customer.



2.

Craft **specific, actionable goals for engaging your audiences** contextually. Do you want to speed prospects through the funnel? Cross sell? Upsell?



3.

Tie real-time goals to revenue goals, remaining mindful of future marketing attribution efforts.



4.

Define what real-time means in your business. Within minutes? Seconds? Nanoseconds? Set the pace that works for you.



5.

To get your blood pumping, **proactively identify a narrow set of scenarios** you're looking to respond to through real-time marketing efforts.



Lap 1

Assess your real-time marketing challenges, possibilities and potential

6.

With your identified scenarios in mind, **set the appropriate business rules for communicating** in real-time based on customer circumstances and needs.



7.

With business rules set, **ensure you can access the audience data** — demographic, behavioral, transactional — required to deliver an authentic real-time experience.



8.

Assess your data infrastructure. Make sure you **have the capabilities to handle streaming data** and can scale to accommodate growth.



9.

Ensure you have a robust processing engine, one that's capable of supporting real-time responses across the full range of channels you intend to use.



Lap 2

Engineer, track and record your customer journey

10.

Put mechanisms in place to **gather data from every real-time interaction** in each of these areas: customer profile, interactions, transactions, and behavior.



11.

Develop utilities and dashboards that will trigger internal notifications and alerts to facilitate exception processing as required.



12.

Execute test runs on selected scenarios to **identify and fix glitches in user flows** and to verify technology readiness.



13.

Run the data you've collected through your modelling and analytics engines to **extract insights and determine how to leverage them.**



14.

Nothing ventured, nothing accomplished. Gradually **deploy pilot programs** using the scenarios you created earlier.



15.

As you continue to add new data to the system, **use the insights gained to streamline your processes**, business rules, and data flows.



Lap 3

Ensure you have the right data and corresponding technology to make real-time marketing possible

16.

Consolidate your data sources to ensure that data is available and actionable regardless of its source.



17.

Keep an eye on the metrics **to determine which real-time interactions reap the greatest rewards.** Consider these your running PRs.



Victory lap

Continue to innovate and evolve your program

18.

Extend the scope and application of real-time scenarios. For example, **fine tune them to include variable environmental data such as weather** or local currency.



19.

Maximize machine learning and AI modules to enable advanced real-time interactions such as dynamic offers, next best action recommendations, and intent-based responses.



20.

Share your insights and learnings far and wide. There's strength in numbers. More data, more interactions, more insights mean improved marketing ROI.



21.

SUCCESS!

Continue to stay attuned to your customers and their evolving habits. Tweak your real-time strategy as often as their needs dictate.



Real-Time Marketing 'Diet Tips'

The 21-Day Fix for real-time marketing is most effective when coupled with a healthy real-time diet. Remove the following to slim and tone even faster:

1

DON'T Confuse real-time marketing with all-the-time marketing

Don't be the brand that talked too much. Respond and react when it benefits your audience, not just when it suits your brand.

3

DON'T Overlook security and privacy policies and regulations

Carefully consider personal privacy, industry norms and ethics when rolling out a new program.

2

DON'T Overlook security and privacy policies and regulations

If your prospects and customers feel they're being watched, they may choose not to interact at all.

4

DON'T Try too hard to capture the moment

Again, consider the benefit to your customers before jumping on an opportunity.

