Gartner's Multichannel Orchestration Model Makes Campaign Management a Science

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Multichannel doesn't mean all channels all the time. It's the selection of complementary channels that serve your objective, leverage investments and address your target buyers. Here's a model to help ensure your campaigns rock.

Key Challenges

- Multichannel marketing campaigns often deliver suboptimal results because the combination of channels doesn't align with the objectives or the target audience.
- Multichannel marketers often choose the wrong channels, too many or too few channels, or fail to target key phases of the purchase process.
- Many digital marketers lack a disciplined and scientific way to decide where their campaigns will live and perform based on the right balance of earned, owned and paid channels.
- Direct ROI for digital marketing investments remains elusive. Metrics that tell you what worked and what didn’t are just as critical as direct line of sight to revenue.

Recommendations

- Set measurable objectives. Keep your eyes on them as you design your campaigns to ensure you get the return your business leaders expect.
- Describe that highest-value target buyer graphically. Demographics will take you just so far. Today, marketers focus more on the psychographic profile (interests, values, attitudes, lifestyle, priorities and purchase triggers).
- Calculate where your buyers are along the path to purchase. Use your stated objective to determine which phases of the purchase path or engagement cycle to target.
- Consider the selection of channels across earned, owned and paid channels. Your choices will hinge on how well those channels address objectives and audience preferences, as well as on the realities of your budget and current investments.
Define the metrics that indicate whether you have succeeded in driving customer behaviors that lead to purchase. You can’t manage what you don’t measure.

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Introduction

Digital marketers who plan a multichannel campaign continue to struggle with the question of which channels to use and how many (see Note 1). Marketers may choose channels because they’re “hot” or because they happen to be easy to mobilize within the company or agency. They may address the audience at the wrong point in the buying process. Without deliberate planning that brings together objectives, a rich target profile and the optimal mix of channels, multichannel campaigns have a 50/50 chance of delivering the goods. You can optimize results by orchestrating multichannel campaigns systematically if you follow a simple five-step process using Gartner’s orchestration model (see Figure 1). Over time, you can add to it and get more sophisticated in how you execute multichannel initiatives. This model will help you with the science so you can concentrate more on the art.
We'll use the example of selling giant inflatable pool swans to consumers and resorts to illustrate how the model works (see Figure 2).
Analysis

Step 1: Set Goals

Every initiative starts here, but multichannel campaigns can quickly lose focus. The size or complexity of these campaigns leads to multiple objectives if you’re not careful.

In our example the goal is straightforward and measurable. You need to sell 20,000 units of a giant, inflatable pool swan by 1 January 2014. It’s a new product, but also an extension of your pool accessories line and on the pricey side. So you have a revenue target and a product — more often than not, this is how the directive is articulated. Now you start the process of thinking through the campaign. You realize this campaign isn’t about awareness. You choose to move those fence-sitters who love your dragon float, but the aggressive goals force you off the current buyer segment and into new markets.

What to Do Next

Identify the goal, for example:

- Cross-sell and upsell current customers
- Gain consideration with fence-sitters
- Identify and engage new customers
Enter new market segments

Step 2: Profile Your Target Audience

Use all the information you have available to create a psychographic profile of your best customers. You may start with demographic information (for instance, people of a certain age, gender and geographic location), but you also need to understand channel preferences, price sensitivity and propensity to advocate, and to zero in on the social or interest graph that best describes the ideal target:

- Owns a pool or lives by a lake
- Weighs less than 250 pounds
- Is not price-sensitive
- Has no latex allergies
- Entertains often
- Drinks rum or beer
- Has previously purchased a sea dragon float

What to Do Next

Do some data housekeeping. The information you collect about your target audience will come from various sources inside and outside of your company. Much of the data will be out-of-date or incompatible. Therefore:

- Clean your contact database, integrate datasets, and remove duplications.
- Run tests to make sure the customer intelligence you have compiled yields accurate results when queried.

Step 3: Identify the Organization’s Constraints

Now, articulate a plan that holds up under management scrutiny and gives a road map to all the players: agencies, your marketing team, product management, distribution, the Web team, customer service … Here, digital marketers start to introduce or avoid huge risk.

You plan the pool swan campaign for one month. You’ll involve your social marketing, website and email marketing teams. Do they have the bandwidth to help? You need to touch base with your suppliers and distributors to make sure they can handle the volume. And what happens if consumers buy 30,000 floats instead of 20,000 — can you keep up with demand? You’ll also need your ad agency to help you buy leads and media time. Can they get your ad to the right people in the right places at the right price?

What to Do Next
Inventory your marketing assets and constraints: Can you reuse marketing material from a previous product launch? Do you have product descriptions, videos and other content for the new product? You don’t get unlimited resources, so what is off limits? Maybe TV is too expensive. Maybe you don’t have the skills to mount a social campaign …

Assess market dynamics: What is the primary selling feature? What market need does it fulfill? What competitor products exist, and what is the competition likely to do?

Confirm field readiness: Can you deliver your product, to retailers or to Internet buyers? Can manufacturing and inventory keep pace with sales? Is customer service aware and ready to answer customer questions?

Step 4: Map the Channels You Will Use

The key step is to fill out the matrix shown in Figure 1 above. Your goal (Step 1) will determine which phases of the purchase process your campaign needs to target (for example, the awareness phase is important for extending your brand to new consumers, while the action phase matters for sales). Your target profile (Step 2) will show you which paid (for example, advertising and search); owned (websites, blogs and communities); and earned (through public relations or social networks) channels to use. It will also help you identify the necessary marketing assets, constraints, and delivery and service requirements. For example, does the target audience for your pool swan campaign use mobile devices or surf the Web from home? Of the channels that suit your audience, which ones can you use most effectively? What will it take to do so?

How do you fill out the orchestration model? When considering your approach to multichannel, start by asking:

What does the purchase process look like for your target audience? What are the common purchase triggers? What channels does the audience use for research?

Within which channels should you establish a presence in order to engage your audience? Can you maintain an authentic brand presence in those channels?

What are the key product attributes? Certain channels and tactics may suit particular attributes. If color is key, visual storytelling might illustrate the color variety in your product assortment.

Where must your brand campaign be unique to differentiate it across each channel and versus competitors?

How can you create seamless transitions across channels to deliver a cohesive and consistent customer experience?

How do budget realities, public perception of your brand and results from prior campaigns shape your multichannel marketing efforts?

Consider Different Approaches in Support of Your Goal

The answers to these questions will help you choose from one of the three approaches to multichannel campaigns — which one best suits the pool swan campaign?
Approach No. 1 — Single: Go long in one channel, with extension into other channels via transmedia. The primary channel engages the audience while the secondary channels promote or expand the campaign, if that’s even necessary to achieve your sales goal. For example, MTV launched an eight-week search for a Twitter Jockey — a social media ambassador who will be paid $100,000 for one year. MTV executed the campaign on Twitter but used its website (owned), other social sites (earned) and local and national media coverage (earned) to promote participation. Choose this approach when:

- Budget constraints limit your choice.
- Desired engagement is channel-specific. Jello’s Fun My Life campaign was based on a commonly used Twitter hashtag — #FML — with limited applicability elsewhere.¹
- Campaign results can aid your business case for expansion into other channels.

Approach No. 2 — Sequential: Build momentum by launching your marketing program in sequences across multiple channels. P.F. Chang’s ran a three-week promotional campaign on Facebook (paid and earned) to drive coupon downloads. After the campaign had reached 9.1 million Facebook users, the brand used Facebook-sponsored stories (paid), its website (owned), email (owned) and media coverage (earned) to attract more attention. Choose this approach when:

- Sequencing across channels enables you to broaden the campaign narrative. For its L’Invitation au Voyage campaign, Louis Vuitton seeded teaser footage through social sites (earned), its website (owned) and print ads (paid). After grabbing the audience’s attention, the brand drew Facebook fans deeper into the storyline through social media content, including an invitation-only premier of a full TV ad through a Facebook application (earned and paid).²
- Launching in phases across channels positions you to generate insights that can inform later campaign elements. A Dove campaign started with mobile ads (paid) that asked women to submit photos of themselves with clean, healthy skin. The ads drove traffic to a branded mobile site (owned) where women could upload photos, with the possibility of being chosen to appear in a Times Square billboard ad (paid). Dove built a library of user-generated content that it later repurposed on its website (owned), social sites (earned) and ads (paid).³

Approach No. 3 — Simultaneous: Launch your campaign across several channels simultaneously to immerse the audience and create numerous opportunities for customer interaction. Mass orchestration does not eliminate the need to identify your target audience. This approach will require substantial resources. Choose this approach when:

- You are launching a new brand or product or rebranding. Old Spice’s "The Man Your Man Should Smell Like" campaign launched on YouTube during the Super Bowl (paid and earned), generated buzz on social sites and prompted video responses from the brand (earned).⁴ The brand also invested in social advertising, such as a promoted Twitter trend (paid) to maximize campaign visibility within specific channels. The campaign, which was featured on the Old Spice website (owned), also garnered national media coverage (earned).⁵
You are telling a big story that suits multiple channels because of the unique attributes of each channel. Cars.com’s "All Drive. No Drama" campaign included TV ads (paid) during the Super Bowl to get media attention (earned) and prompt social chatter (earned). The brand also invested in digital advertising (paid), which targeted specific audiences and drove traffic to an interactive website (owned). Contests and content on social sites (earned) kept organic conversation going.

Probably the sequential approach would work best for the swan campaign. It focuses on moving fence-sitters (people who already know about the product) to want the new float and to buy it. Therefore, the campaign hits mainly the intention, desire and action phases (see Figure 3). The budget and target profile suggest an array of channels to use.

*Figure 3. Multichannel Orchestration Matrix for Swan Campaign*

<table>
<thead>
<tr>
<th>Channel Choices</th>
<th>Purchase Path</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Awareness</strong></td>
<td></td>
</tr>
<tr>
<td>Owned</td>
<td>Facebook page post</td>
</tr>
<tr>
<td>Paid</td>
<td>Geotargeted paid search</td>
</tr>
<tr>
<td>Earned</td>
<td>Social promotion</td>
</tr>
</tbody>
</table>

Source: Gartner (October 2013)

**What to Do Next**

- Define the consumer benefit. How is the consumer better off? Do they have the information to make a purchase decision? Have you added dimension to the brand story?
- Plan the life cycle of the campaign. What is the life expectancy of the customer experience? What is the exit plan across the various channels?
- If you take the "single" approach, use the results to gain insight into what did or did not work and build a business case for greater investment in secondary channels.
Step 5: Measure the Results

Last, you have to understand and report on whether you achieved your goal (sell 20,000 units) within budget and within the campaign’s time frame (end of the year) and understand which channels yielded business results. You will also benefit from finding out what works and what doesn’t with each channel so that you can adjust the campaign while it’s in progress and apply these lessons to future campaign designs.

What to Do Next

- Define metrics upfront that tell you whether you have succeeded in customer engagement — for instance, satisfaction, recommendations and social sharing — as well as internal goals, such as lead conversion rates.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

- "Five Things Your Executives Need to Know About Going Digital"
- "Use This Framework for Multichannel Campaign Management"
- "Cost Optimization in Multichannel Marketing"
- "Marketers Look to the Zero Moment of Truth Framework for Digital Commerce Planning"

Evidence

We based this report on discussions with digital marketers designing multichannel campaigns and on our own agency and digital marketing strategy experience working on them as recent practitioners. Internal Gartner research discussion helped us to formulate the orchestration model and process.

1 H. Bradford, "Jell-O’s Fun My Life Twitter Campaign: Social Media Genius or Just ‘Funning’ Annoying?" Huffington Post, 24 May 2013.


4 C. Hodgson, "Old Spice — Brand Reborn by Hunk on a Horse," Brandaide.


Note 1 Definition of Multichannel Marketing
Gartner defines multichannel marketing as optimizing the customer engagement according to the way customers want to talk, shop, buy and obtain services through digital and offline channels, orchestrated to build ensemble interactions that create differentiated and compelling experiences.
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