



Apteco

From insight to action Why intelligent campaign automation is vital for marketing success

Learn how marketers can go beyond basic marketing automation and succeed in a data-driven world.

What is campaign automation and why is it important?

Life as a marketer can be tough. The average person sees up to 11,000 marketing messages and adverts every day, which makes cutting through the noise increasingly difficult. To make matters worse, Forbes reports that marketing budgets are being slashed yet CMOs are still being asked to drive growth.

Succeeding in this competitive environment with limited resources means that marketers have to be smart about what they can do to delight customers and deliver

personalised campaigns without working endlessly around the clock.

When marketers want to improve the customer experience and boost efficiency, they often think of the term marketing automation.

However, there are two main reasons why marketers should opt for campaign automation instead of marketing automation: more efficient, and more effective marketing campaigns.

“Automation applied to an efficient operation will magnify the efficiency... automation applied to an inefficient operation will magnify the inefficiency.”

Bill Gates

Efficiency benefits

- 1 Simplified processes
- 2 Automated tasks
- 3 More time freed up for high-value activities
- 4 Less dependence on IT

Effectiveness benefits

- 1 Powerful targeting (to the right person)
- 2 Personalised content (the right content)
- 3 Event-triggered sends (at the right time)
- 4 Omnichannel activities (through the right channels)

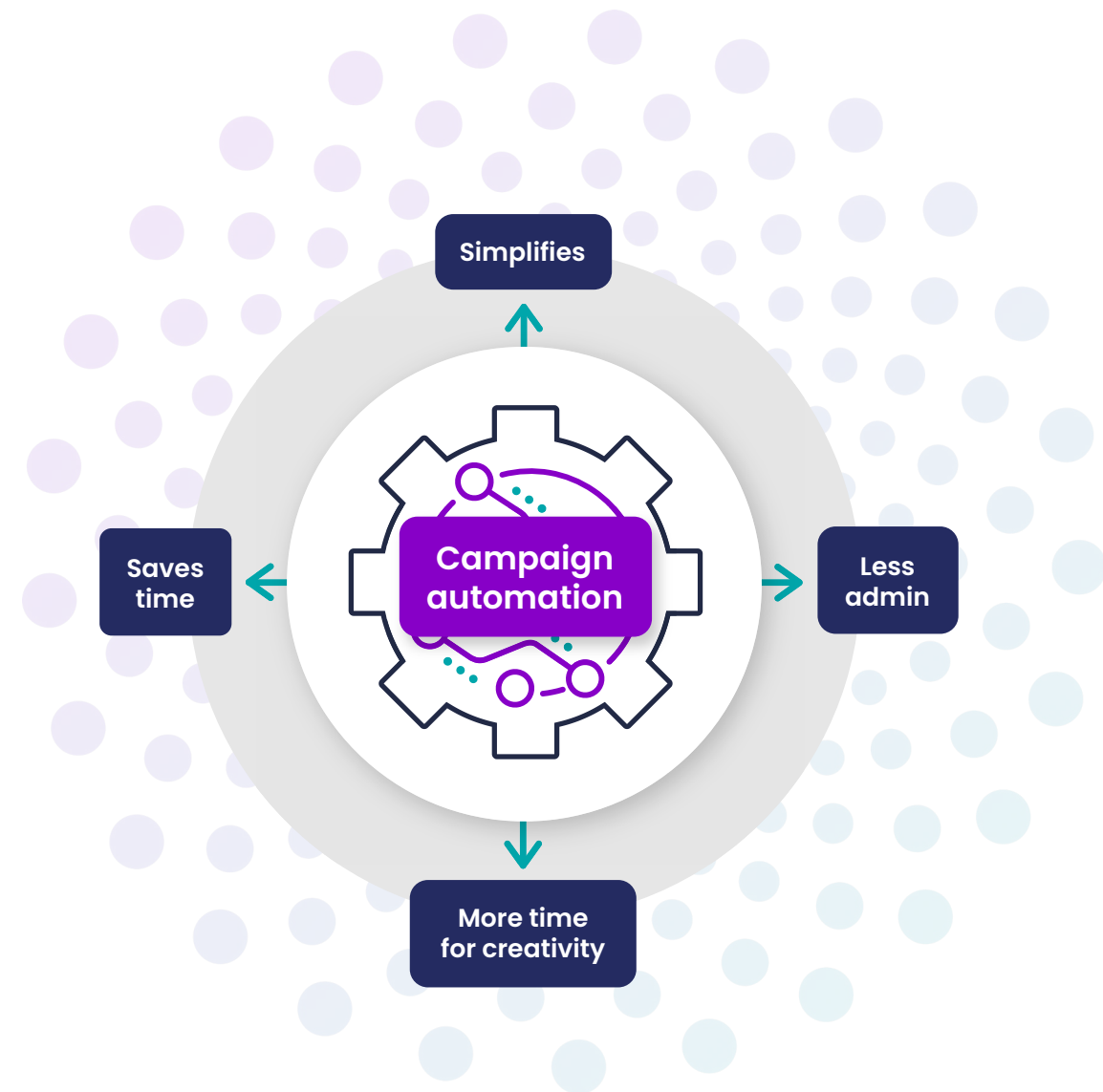


Campaign automation = greater efficiency

Campaign automation makes marketing activities happen faster. It simplifies and automates manual tasks and processes, such as counts, selections, and the creation of target audiences.

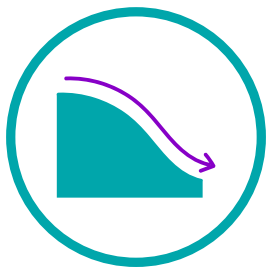
According to the Marketing Automation Report 2021 by Aioma, saving time on repetitive tasks was the most frequently cited benefit of marketing automation, referenced by 49% of marketing experts.

By reducing admin work, marketers have more freedom to spend time on higher-value tasks and find creative ways to delight their customers. This is one of the most desirable and impactful things managers, CMOs, and directors can do – yet it can be easy for companies to lose sight of this when key decision-makers are weighed down by menial tasks such as repetitive file uploads.

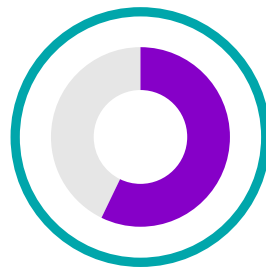


Another way campaign automation saves time is by minimising marketers' reliance on other departments, such as IT. Because less support is needed for manual requests like updating target groups and redefining customer segments, both departments can move at speed without unnecessary back-and-forth. Doing this makes their future collaborations more meaningful – and much less monotonous.

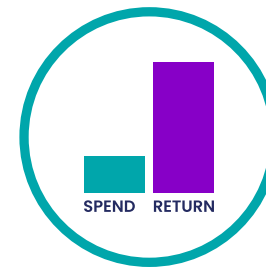
Take New Look as an example. Once their marketing team had their own access to data, insights and predictive models, the results were clear:



**90% reduction in email
unsubscribes**



**57% increase
in web visits**



**3.7x return on
advertising spend**

Campaign automation = greater effectiveness

Campaign automation platforms make your marketing activities more effective largely due to one aspect: **personalisation at scale**. Along with time savings, personalised communication was cited by 49% of marketing experts as one of the main benefits of marketing automation.

Consumers are bombarded with messages every day (marketing or not) – so they will only be interested in those that are relevant. Campaign automation gives marketers the ability to personalise products, offers, and discounts based on past transactional data, and even utilise predictive analytics techniques.

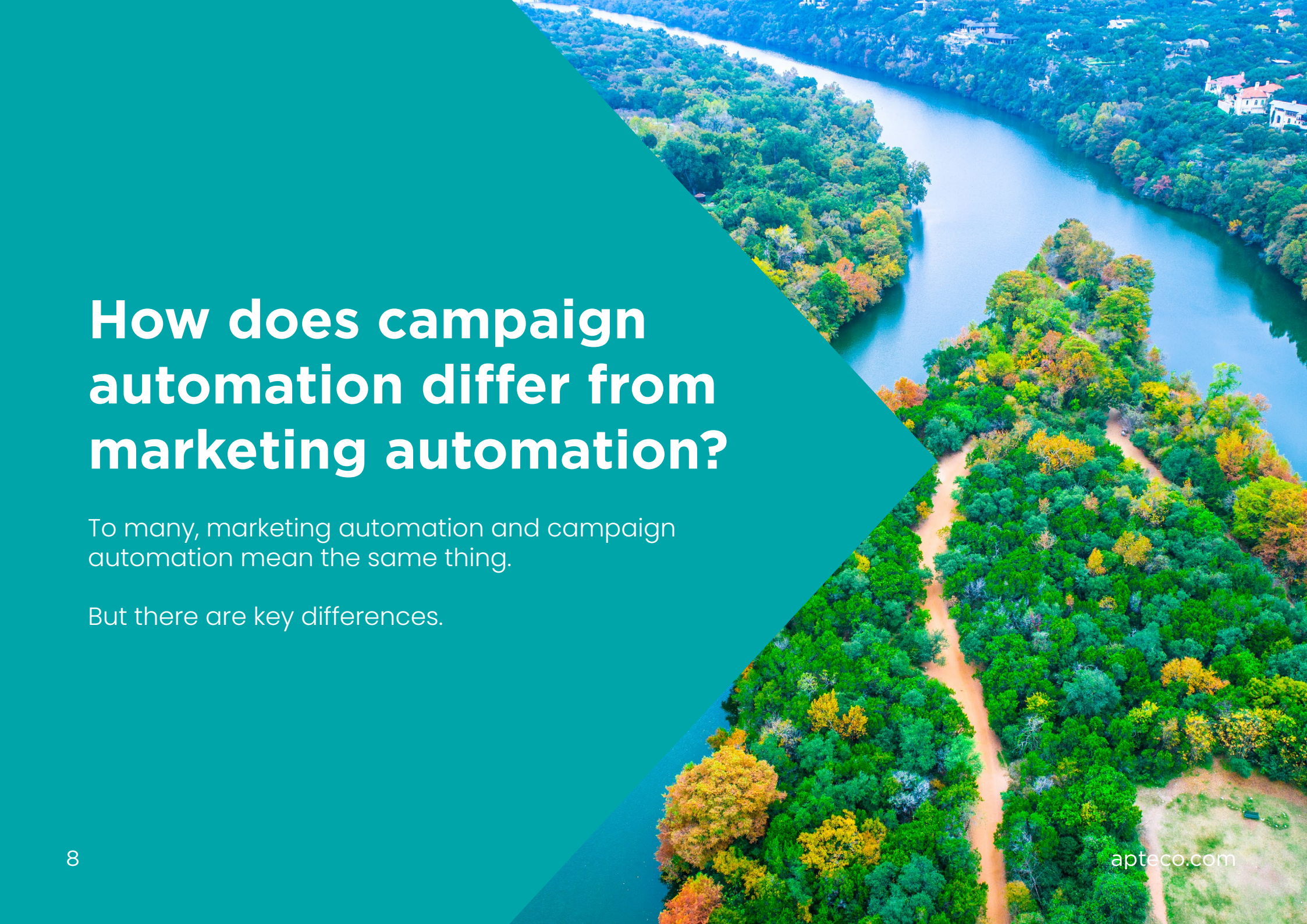
This greatly improves the chance that individuals will receive the right content, through the right channels, and at the right time. And because consumer needs evolve over time, its effectiveness can be continually refined through A/B testing and automated alternatives.

Overall, personalisation, targeting, and analytical insights are key to improving the customer journey across different touchpoints, and ultimately, the customer experience. Without these, automation doesn't work.

By avoiding poor segmentation and targeting and being able to track and measure what is working best, losses can be prevented and budget allocated to those activities that are promising. In this way improving marketing effectiveness through campaign automation also has a positive financial impact.

Overall, personalisation, targeting, and analytical insights are key to improving the customer journey across different touchpoints.



An aerial photograph of a river flowing through a dense forest. The trees are in various stages of autumn, with some showing vibrant yellow and orange leaves, while others remain green. The river is a deep blue, reflecting the sky. In the background, some houses are visible on a hillside. A large teal triangle is overlaid on the left side of the image, containing the text.

How does campaign automation differ from marketing automation?

To many, marketing automation and campaign automation mean the same thing.

But there are key differences.



Marketing automation

Marketing automation is a category of technology that allows companies to streamline, automate, and measure marketing tasks and workflows. The intended goal of marketing automation is to improve your company's operational efficiency and hopefully grow revenue faster. An example would be an automated confirmation email when someone fills in a form to download a free eBook or makes a purchase.



Campaign automation

Campaign automation is different. It's the use of an omnichannel software platform to consolidate, create, and automate a variety of related marketing initiatives. Not only does it offer deeper data analysis and more complex targeting, it also gives companies the ability to fully automate the end-to-end campaign process.

Differences at a glance

Marketing automation

Typically PULL focus

Very often standard repeatable campaigns for one person, e.g. whitepaper downloads

Typically uses a few key data sources such as CRM and website

Largely driven by website user behaviour, specific events or journeys

Typically does not factor in transactional data

Often associated with B2B lead nurturing and/or sales funnel

Lead scoring with rudimentary rules (e.g. 1 point for website visit, 3 points for whitepaper download)

Basic personalisation rules based e.g. on salutation or areas of interest

Campaign automation

Typically a combination of PUSH and PULL

Typically includes multiple people or overlapping segments in a campaign, may include complex segment building

Makes use of many different data sources including transactional data, interests, third party data

Takes diverse customer behaviours into account and supports a broad range of campaign types, e.g. ad hoc, recurring, event-triggered and lifecycle campaigns

Takes all available transactional data as well as contact and response history into account

Typically higher volume B2C (and B2B) with customer centricity in focus

Involves predictive analytics based scoring

Typically includes more complex personalisation rules, e.g. next best offer

Campaign automation is therefore more complex and insight-driven than marketing automation – by taking it to the next level of sophistication.

Campaign automation in action

There are various ways marketers can make the most out of campaign automation. Let's take a look at some practical real-life examples, in order of complexity:



**Birthday
campaign**



**Shopping cart
abandonment**



**Churn
prevention**

Example 1: Birthday campaigns

A must-have for all companies (but especially those in the FMCG sector) are birthday campaigns, which are an effective way to maintain and nurture customer relationships. For instance, a customer's birthday could trigger a discount offer to be sent to their email inbox.

However, it's important that marketers don't rely on generic techniques; a smarter approach would be to personalise offers based on age, geolocation, transactional history, and other demographic factors. This will ensure that your message will 'pop' and is more likely to boost engagement.

Also consider the channel that is most likely to work for your audience and their fulfilment times – a postcard mailing and an email campaign need to be sent out at different dates to arrive in time.



How to:



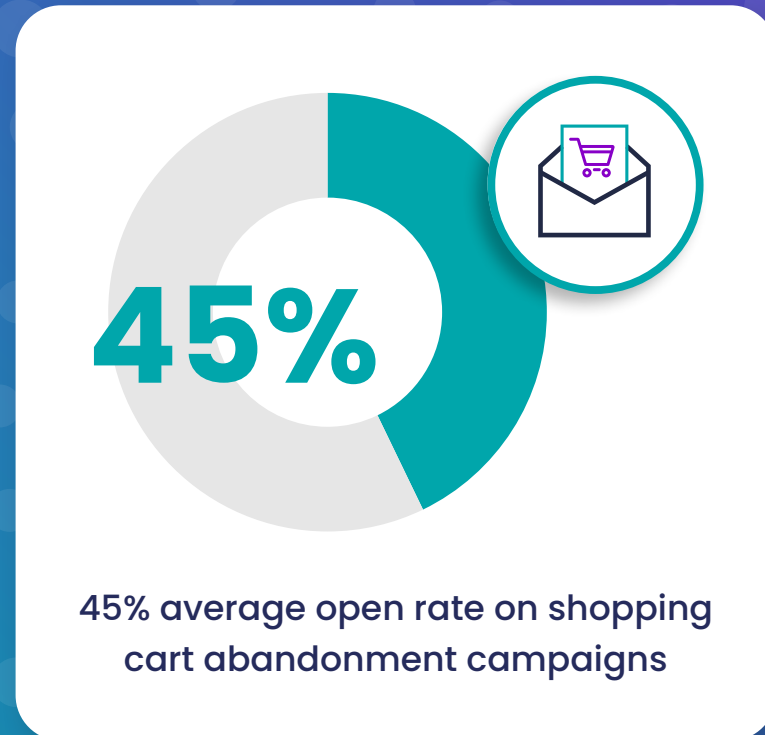
Create a target group that includes people who have a birthday on a specific day.



Decide on the most appropriate content.

Example 2: Shopping cart abandonment

For e-commerce businesses, shopping cart recovery campaigns are invaluable because they can directly increase sales and revenue. When a customer abandons their online shopping cart, this can trigger a promotional offer based on the items they selected. According to Shopify, this type of email campaign has an average open rate of 45% – a big improvement to the benchmark of 18.39% for general retail emails.





How to:



Use a live-trigger: all visitors abandoning their cart will automatically become a part of the target group. Further steps will depend on their behaviour:

No reaction



send a new reminder, maybe via a different channel.

**Click but
no purchase**



send a temporary offer.

Purchase



send a thank you message.

One way to execute this campaign is to offer a fixed discount on the cart items. But this isn't recommended for two reasons.

- Firstly, it's standard practice and does little to make your company stand out.
- Secondly, recovery campaigns are easily exploited by customers who intentionally abandon their carts and wait for offers before purchasing.

The better approach is to create a reactive and personalised recovery campaign that takes customer habits into account. This may include promoting the best next offer based on cart items (if data on previous transactions are available) or by individualising send times.

Example 3: Churn prevention

This type of campaign requires more sophisticated steps, but it's a powerful way of increasing customer retention.

Campaign automation allows you to extract rich behavioural insights to help you understand patterns in behaviour from customers who have previously lapsed. For example, your CRM system should be able to tell you how many times a certain customer called customer service and then returned a product.

This data is essential in helping you reactivate customers who are about to lapse. You can recognise previous behavioural patterns and spot when current customers are exhibiting the same behaviours. It's then possible to pre-emptively act to repair the relationship, whether that's through a discount, or two-for-one offer, or a personalised marketing message.



How to:



Create a profile of people who already lapsed to identify common characteristics.



Allocate a score to current customers based on this profile – the higher the score, the more likely they are to lapse.



Send out campaigns with measures to retain customers (special offers, discounts, etc.)

How to combine insight and action

We've seen that a range of different capabilities is needed from your marketing technology to automate campaigns intelligently. This includes:

Analysis



Customer segmentation

Break down, organise, and understand your wider customer base, and begin personalising and building conversations.



Audience selections

Quickly create and check a target audience list for your campaign, and then export, or trigger a broadcast, using your chosen ESP.



Event-trigger prediction

Send proactive and preemptive marketing messages based on how you expect customers to act in the near future.



Customer journey analytics

Understand customer behaviour and optimise the customer experience.



Personalisation rules

Achieve high levels of personalisation every time, across every channel, and with every customer.



Predictive analytics

Use powerful data analytics to suggest the Best Next Offer, Best Next Time, or Best Next Customer.

Campaigning

Who



Complex audience rules

-

For example, establish contact rules frequency capping so that your audience is not bombarded with multiple messages.



Campaign optimisation and campaign prioritisation

-

For customers who appear in multiple segments, analyse which campaigns have the best chance of success.

When



Lifecycle stage campaigns

-

Segments are constantly evolving as customers' circumstances evolve and they move between active and inactive status.



Event-triggered campaigning

-

Send the right message at the right time to increase its effectiveness and relevance.

What



Real time and website personalisation

-

Demonstrate that you truly understand each customer's preferences and habits.



Complex personalisation rules

-

Offer customers relevant and personalised offers, communicating on a 1:1 level.



Control groups

-

Use control groups and on-going response analysis to make changes to improve performance.



A/B testing

-

Conduct A/B tests to identify the messages and channels that offer the best results.

How



Channel preferences

-

Communicate with each customer on their preferred channels to boost engagement.



Omni-channel / customer journey interactions

-

Get a full picture of every customer by collating multi-channel data in a single customer view.

The future of campaigning

The global AI market value is expected to rise to £190 billion in 2025, so it's likely that artificial intelligence will play an increasingly important role for companies. The combination of data, analytics and campaigns will become more essential, so an "insight into action" approach is critical.

With Apteco intelligence, AI can support the entire campaign process – from send time optimisation, to audience selection and campaign optimisation. It's important that marketers make full use of this going forward, or risk being left behind.



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