



Evoke POV

Dynamic CRM: Engage customers and enhance relationships with a more fluid experience



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Customer relationship management (CRM) is a vital component of today's marketing ecosystem, often used in patient adherence initiatives and disease education/awareness campaigns. These programs allow brands to maintain a continuous conversation with patients long after their first interaction.

In the past, when developing CRM programs, brands would typically create a set number of communications, each of which would address a key topic. Due to economies of scale, email has been the communication mechanism of choice, usually lifting creative directly from the consumer website. To up the level of sophistication, marketers can segment their audience—eg, prospect vs patient; patient vs caregiver; or newly diagnosed vs switch patient. This would then create segment-based CRM streams with segment-relevant content.

But what if we leveraged user behavior and user-provided data to influence future communications instead of segmenting the audience in the typical fashion? By taking this more dynamic CRM approach, marketers are discovering ways to increase engagement with email and beyond.

Introducing Dynamic CRM

We live in a world of personalization and data. With dynamic CRM, brands can utilize broader trends, letting consumer behaviors and consumer-provided data influence content, formats, cadence, and channels. These inputs include registration entry parameters, email engagements (opens and clicks), surveys and third-party data (ie, co-pay card use, event attendance...), to name a few.

By using behavioral data and user-provided inputs, CRM communications become much more tailored and personalized, increasing impact and effectiveness. Currently, only a few marketers are using behavior and data to influence their CRM components. According to a 2018 study conducted by Econsultancy and Adestra:

- 19% of marketers are using dynamic content
- 24% of marketers are using behavioral targeting (web activity)
- 26% of marketers are using multi-channel triggers

Building a More Dynamic CRM Program

Marketers can begin to build more dynamic programming by rethinking their approach to content development, starting with email. This shift from developing emails as one long piece of content will turn into a shorter, modular fashion, ensuring each module is succinct and focused on a particular topic. By leveraging this approach, marketers can swap content modules in and out, making email communications more focused, valuable, timely, and personalized. As long as there is a central database that can be configured to capture all the data points of interest, these initiatives can be both efficient and effective, without any major added expense.

Using Behavior and Data to Make Things Dynamic

To make CRM programs dynamic, marketers should incorporate a variety of user-provided data collected from a range of engagements and behaviors. When selecting which data to use, you should consider your program goals and current ecosystem.

Priorities vs Challenges of Email Marketing According to Marketers Worldwide (2018)



Source: Ascend2, "Email Marketing Engagement: Survey Summary Report."
(March 2018)



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Usage of Select Email Marketing Tactics Among In-House Marketers Worldwide (2018)
% of respondents

	Currently use	Plan to use	Don't use
Basic segmentation	82%	11%	7%
Optimizing for mobile devices	70%	18%	12%
Regular list cleansing	55%	27%	18%
Encouraging sharing of content on social networks	82%	11%	7%
Remarketing	44%	24%	32%
Video content	41%	28%	31%
Transactional emails for marketing	39%	19%	42%
Content personalization (beyond just name)	35%	37%	28%
Lead nurturing	35%	37%	28%
Location-based content	33%	18%	49%
Advanced segmentation	31%	43%	26%
Lifecycle programs	29%	33%	38%
Promoting customer ratings and reviews	27%	23%	50%
Multichannel triggers (eg, sales call)	26%	25%	49%
Behavioral targeting (based on web activity)	24%	39%	37%
Dynamic content (live listings/availability)	19%	30%	51%
Lead scoring	17%	25%	58%
Dynamic social feeds	11%	18%	71%

Note: N=324. Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra (June 2018)

The categorized data can then be formatted and used to influence future content, establish cadence, and allow users to change streams when key moments are captured (for example, changing from a prospect to patient CRM stream). The data can also be used to trigger a tailored email or direct mail package, or outbound calls from a patient support call center—all of which can then be used to gain additional data points.

Better Results

Dynamic programs are proving to result not only in better overall engagement and fewer opt-outs, but also better business results, such as an uptick in patient refills or an increase in diagnoses and/or scripts, and an increase in consumer data (with users more willing to provide personal information, knowing it will be used to personalize or tailor their experience).

Based on our experience, we've seen tremendous results working with clients who make the move to dynamic CRM. For example, one brand saw a 10% market share increase after launching a dynamic CRM program. Other results have included:

- An increase of approximately **25%** in the number of registrants who return to the website to engage with additional pages and complete additional actions
- A nearly **60%** increase in session duration
- More than **55%** increase in test and survey completion rates
- A nearly **80%** increase in brand registration from a "forward to a friend" mechanism
- **1.3%** higher rate of filled drugs by dynamic CRM program participants

So go ahead and free yourself from the past, and let your CRM registrants embark on their own unique journey.

If you're ready to put your data to work and offer your customers a more customized journey with your brand, now is the time to start building a more dynamic CRM program. Speak to your Evoke Client Services lead or contact business@evokegroup.com to learn more.

Specifically, you may want to look at:

- **Tracking engagement** (clicks) on specific content modules within emails to influence future content topics or formats. Engagement with other trackable digital channels—like websites or paid media—can also be used to influence future communications.
- **Embedding "listening questions"** (or short surveys) into communications to capture more user data, which can help you understand more about each person on an individual level and can be used to influence future content or move users into new sections or streams of a CRM program.
- **Integrating a call center or other personal touch points**, such as educational events, can also help trigger one-off communications or capture more data that can be used to adjust content or streams.