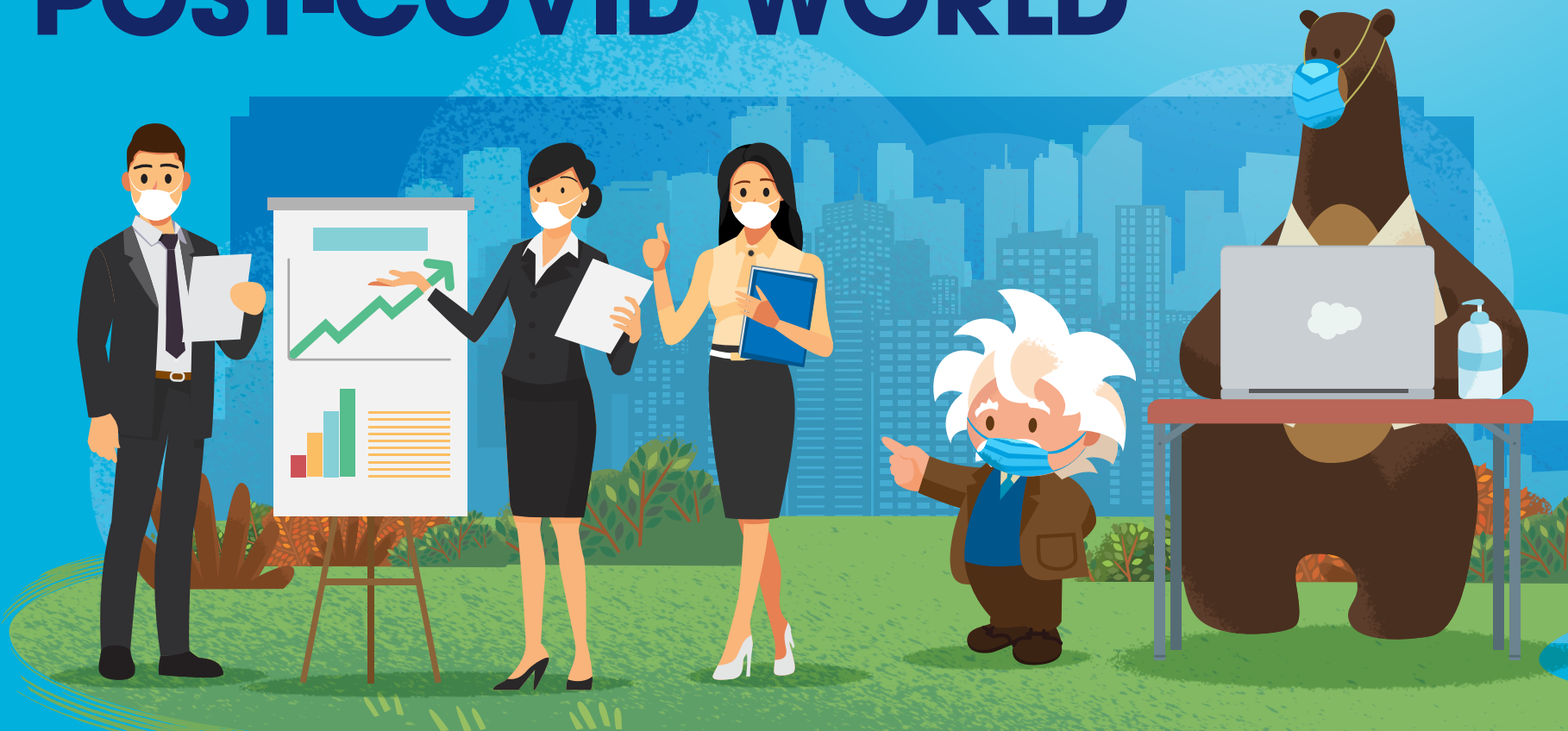


# *The* **MARKETER'S PLAYBOOK** *for* **SUCCESS** *in a* **POST-COVID WORLD**

salesforce



# FOREWORD



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## Marketing in times of disruption

COVID-19 has accelerated digital adoption. More customers are now open to e-retail, enrolling for virtual education, and making financial investments online. And amidst all these changes, organisations are looking at marketers to boost customer engagement and loyalty. As marketers, how do you communicate how your products and services are aligned to their changing needs?

To provide actionable insights for marketers and brand custodians, Salesforce hosted a webinar on [\*How to Innovate in Times of Disruption\*](#).

Hosted by Saurabh Rawal, Data & Identity Lead at Salesforce, the session featured James McQuivey, Ph.D., Principal Analyst & VP at Forrester, and author of *Digital Disruption: Unleashing the Next Wave of Innovation*.



Here are some insights from the session:



### Start and end with the customer

Forrester Research has identified four fundamental needs every customer has. Customers enjoy comfort, want to stay connected, express their uniqueness, and choose from a great variety.

Marketers can support their organisation in creating communication and brand identity that showcases how their business is obsessed with fulfilling these customer needs. There's a direct bottom-line benefit to this approach. A Forrester report on *'The Customer-Obsessed Enterprise'* discusses how these firms enjoy higher revenue growth, and customer and employee satisfaction.



### Use data to build relationships and gain a competitive edge

At a time when communication is high on sympathy, data can help you move the needle to empathy; from 'we care about you' to 'we care about the things that matter to you'. Data lets you hyper-personalise customer communication to demonstrate this attention to customer preferences. Understanding data makes us all the better at being able to be agile with our strategy and create compelling content that reaches people through both the head and the heart.

And with predictive analysis, you can even provide intelligent recommendations that excite and engage your customer. Wouldn't you be thrilled to receive a message from your beloved pizza brand that tells you that not only are they offering contactless delivery, but that your favourite crust and toppings are already in your cart?

Solutions like *Salesforce Marketing Cloud* help consolidate customer data from various touchpoints to present a unified view of the customer. With this 360-degree view of customers' interactions, preferences, and behaviours, brands can hyper-personalise communication and reach out to them with the right messages at the right time. Showing that you care about customer preferences can be more powerful than blanket promotions and offers.



### Leverage technology to do more with less

The cost of innovation has declined as the technology has become cheaper. This, in turn, has increased the pace of (marketing) innovation, helping bring more ideas to market far quicker than before. In these times of slashed marketing budgets, and with customers spending a large chunk of their time online, traditional marketing channels are losing traction. Digital marketing, on

the other hand, gives you access to a global audience in a more cost-effective way. Using analytics and social listening, marketers can also create more focused and engaging campaigns.

Metro shoes, for example, tweaked its marketing strategy to launch the [#ShoesOff campaign](#) that recognised the change in customer behaviour due to COVID-19. Through this campaign, the footwear brand promoted social distancing and stay-at-home messaging through contests on Facebook and Instagram while simultaneously encouraging customers to explore fun things to do with shoes.

During these extraordinary times, marketers must think like a disruptor. Isolate the parts of your ecosystem that you can influence, such as customer behaviour and spending patterns, and be open to experimenting with new technology.



## Market with empathy

In today's climate, marketers have to channel their sixth sense: empathy. They must rely on their understanding of their customers and themselves during life's most stressful events. Values and belief systems matter more than ever – this cannot be just a marketing exercise. Businesses are powerful platforms for social change and one of the platforms where we can best help educate, elevate, empower, and learn. Marketers need to engage through empathy. To gain empathy, marketers need to listen to our communities, employees, customers, and partners and remind themselves that they are marketing to people.

Great brands create strong brand equity if they manage these moments well. They stand out from others by embracing their core values and eschewing short-term gains in favour of caring for their employees and customers. They know how to use the brand-building media effectively to generate a share of voice to emerge not just alive but a winner in such situations.





*Chapter 1: Marketing Disrupted: The Sign of Things to Come*

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*Chapter 2: Ushering in Marketing 4.0 with Technology*

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*Chapter 3: The 3R Framework for the Here and Now*

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*Chapter 4: Humanising Marketing to Build Deeper Connections*

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*Chapter 5: How IDFC Asset Management Uses Technology to Enable Seamless Customer Experiences*

## Chapter 1

# Marketing Disrupted: The Sign of Things to Come

## A look at trends that challenged the marketing function in 2020 and will shape what marketers do in 2021

Marketers are unlikely to see another year such as 2020 with all the seismic shifts it brought about. Some of these changes will remain as we head into the new year. “Individuals and organisations shifted towards a digital approach almost overnight, from daily meetings to events; everything pivoted to being virtual and remote. This only goes to indicate that the consumer in the new normal is increasingly adapting to a digital world,” says Saurabh Rawal, Data and Identity Lead, Salesforce India.

Savvy marketers have been quick to respond to these changes with innovation and agility while striving to keep the customer at the centre of all they do.

In recent years, the chief marketing officer (CMO) has donned a new role – that of the chief custodian of customer experiences. According to the [latest Salesforce State of Marketing Report](#), **84% of customers say the experience a company provides is as important as its products and services – up from 80% in 2018.**

The ongoing health crisis has only highlighted the importance that customers place on experience. Take India’s largest online bus ticketing platform, redBus. During Lockdown 1.0, the company saw call volumes increasing due to pandemic-related queries. Initially, with service agents working from home, redBus struggled to maintain the customer service levels it offers in normal times. This left many customers dissatisfied. But the company’s [customer obsession and technology pivot helped](#) it to quickly turn around the situation.

As customers continue to navigate a series of ‘new normal’ triggered by COVID-19, they expect brands to be empathetic, to understand and anticipate their needs, stay relevant and unwaveringly helpful, and continue to ensure the great, omnichannel customer experience.



The marketers have an extended mandate now to manage the customer experience and manage it skillfully. Never has the CMO's role been more important or under greater public scrutiny than now. As the team that brings the brand to the market,

Such times are marked by new marketing trends even as opportunities open for those brands willing to look beyond the immediate crisis.

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“ CMOs are expected to balance a focus on customer-centricity with the need to drive business continuity and growth.

– **Saurabh Rawal**, *Data and Identity Lead*,  
**Salesforce India** ”

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## Creating opportunities from challenges

At the recently held 'Marketing in Motion' webinar, **Stephanie Buscemi**, CMO, **Salesforce**, made some thought-provoking points: Where is the space for marketers when people are so focused on basics like the health and safety of their families and friends? Is there a point to doing business as usual anymore? How can a marketer be helpful?

Consider **Medlife.com**, an online healthcare technology solution provider. When the COVID-triggered lockdown commenced in India, it was faced with such existential questions. With business being anything but usual, consumers were facing a trust issue with an overdose of COVID-related news from unverified sources. A consumer survey revealed that 85% wanted to hear from experts. So, **Medlife created a series of videos** where doctors spoke about COVID-19, steps to take to maintain hygiene, and other pandemic-related information. **Meera Iyer**, CMO, **Medlife**, said the initiative helped the brand transform from being a pure e-commerce player to a company that cares about improving health outcomes. This resulted in immense goodwill and increased brand trust.

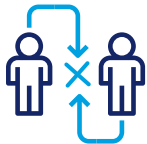
The pandemic has created trends that are likely to remain long after the pandemic itself is over. These include working from home, and a move towards virtual anything – think shopping, education, banking services, healthcare, etc. These trends, while presenting huge opportunities, also highlight key marketing challenges that companies are currently facing.



## 1. Inability to build flexibility and agility in marketing

Due to the ongoing health crisis, people are continuing to work from home and prefer spending time indoors. Consumers are embracing digital engagement at a faster clip. This means that as a marketer, you must engage them on a real-time basis, leaving no room for broken customer experiences.

Brands need to be able to offer seamless customer experience across all digital touchpoints. But this becomes a huge challenge for companies that haven't innovated or undertaken digital transformation to build a digital-first presence. Which, in turn, will not allow you to be flexible or stay nimble in your marketing approach. For instance, by pivoting to virtual events or using your digital channels to market a new service or build engagements meaningfully.



## 2. Inability to engage in meaningful engagements

According to a [Deloitte report on 2021 Global Marketing Trends](#), consumers are gravitating towards **brands that support social endeavours**. This is particularly true for Gen Z and millennial customers who will walk away from brands that don't live up to their values or have a purpose to their *raison d'être*. Brands that are authentic and purpose-driven have better engagement rates as compared with those that support a cause for a season or a reason. According to another [Deloitte report](#), purpose-driven companies witness higher market share gains and grow on average three times faster than their competitors, all the while achieving higher employee and customer satisfaction.



## 3. Lack of personalisation

For the digital-first customer, only brands with personalised messaging showing an understanding of their needs stand out. Unfortunately, the lack of a single source of customer truth that can drive insights means that most brands are unable to offer this critical 1-1 customer relationship.

Technologies that offer a complete 360-degree customer view can help you connect more contextually and meaningfully. [Medlife](#) used granular customer data for life-saving personalisation. For instance, data classification on patient clusters helped it to personalise pandemic-related communications according to disease type. Thus, patients with diabetes received different messages than heart patients or people with thyroid and respiratory issues. Again, leveraging customer segmentation, it was able to send messages in the vernacular language. "Language personalisation made a huge difference. Suddenly, almost 55% of our orders outside of the metro regions came from our Hindi app," says Iyer.

Such granularity of data and insights from customer segmentation is possible with a platform like [Salesforce Marketing Cloud](#) that can help you gain a unified view of all the customer data across multiple systems to initiate hyper-personalised marketing conversations that end at customer brand advocacy.



## 4. Dearth of marketing talent with future-first skills

Marketing tools may have modernised, but the workforce has not been able to keep up with this modernisation due to lack of training.

Marketers will need to enhance skill sets related to new technologies such as artificial intelligence (AI) and Big Data analysis that will feed into empathy-led marketing, the need of the hour. The disconnect between marketing tools and their actual users inhibits innovation in marketing from reaching its full potential. Bridging this gap is a top priority for CMOs across the world.

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“ Almost 70% of marketers feel traditional marketing roles limit customer engagement  
- **Chris Jacob, Director - Product Marketing, Salesforce.** ”

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## Chapter 2

# Ushering in Marketing 4.0 with Technology

## Understand how marketers can leverage technology to deal with disruption and change

Each of these challenges also presents an opportunity for marketers to drive innovation and experiment in new ways. It's time for marketers to reinvent and reimagine their roles, firmly keeping the customer at the heart of all they do.

With multiple touchpoints and non-linear customer journeys, CMOs will need to revisit metrics that help define business values. For instance, if traditional marketing metrics were all about lead generation and customer acquisition, now marketing must include social analytics to understand the tone, emotions, and implications of social conversations through social media monitoring. Consider department store chain **Shoppers Stop** which listened to customers on social channels and created campaigns based on customer sentiments and needs.

"We launched a survey with nearly 7 million customers to understand what they were looking for," explains Uma Talreja, CMO, Shoppers Stop. The retailer then created content based on its understanding of customer needs. Another example is that of consumer durables and

electronics retail brand, Croma, which used social listening to build a digital narrative. According to Ritesh Ghosal, CMO, **Croma Infinity Retail**, the brand veered towards responsible consumption a few years back. At the height of the lockdown, when the brand focused on social listening, "we took cues from people talking of skies clearing up, water in the Ganges suddenly becoming crystal clear, etc., and we picked this up as a trend," remarks Ritesh. The retailer created the This too shall pass campaign to spread hope to consumers with a subtle message that post-pandemic the trend of responsible consumption must continue for the greater good.

In all these instances, brands used social listening to gauge customer sentiments better. When CMOs look beyond their traditional roles and adopt new technology, they will be able to live up to changing customer expectations. Solutions such as **Social Studio** allow you to listen, engage, and publish by using your social channels and boosting your overall marketing efforts.

A futuristic marketer can drive superlative, seamless customer experiences through innovation and new technology adoption.



# Transforming marketing through technology

Technology will continue to be the linchpin that helps the CMO transcend business and customer expectations. **Godrej Consumer Products** moved online to connect with its customers.

“Traditionally, we used to do our consumer research a certain way, but with the lockdown, we completely moved to connecting with our consumers virtually from video calls to online groups. We listened to what they said and took cues from it,” says Subha Sreenivasan Iyer, VP & Head - Media Services, Godrej Consumer Products Limited. These cues around safety and health led the company to launch a range of products under ‘Protekt’ brand for home care, personal care, and kitchen.

Technology can help you gauge consumer sentiments better, but all that consumer data needs to reside on one platform if you are to derive actionable insights. **Salesforce Marketing Cloud** does just this.

According to Vaishnav, by leveraging Salesforce Marketing Cloud, customers can get answers questions that often puzzle them, such as:

It connects data across multiple devices and sources and gives you a unified view of your customer. Technologies like the Customer Data Platform (CDP) that offer a **complete 360-degree customer view** can help you connect more contextually and meaningfully across touchpoints. With CDP, different teams across your organisation can have a 360-view of the customer’s interaction with your brand.

In an era, where customers constantly engage with brands across multiple touchpoints including WhatsApp, social media platforms, email, websites, etc. having a CDP helps you create a unified profile of your customer; making it easy for you to personalise communications yet drive engagement at scale.

“Invest in your data – it is the new oil. It drives your marketing decisions, especially when you invest in so many different channels,” says Yashdeep Vaishnav, Director, Salesforce Marketing Cloud.



With teams seeing budgets getting slashed in recent times, it is more important than before to analyse campaign performance and optimise them for maximum ROI. Marketing analytics can help ensure that you are meeting your objectives, reaching the right target group and importantly, spending in the right channels.

Rawal believes that a **data-driven and inclusive approach** will always be important to marketers, helping them stay ahead of the competition and provide an unmatched customer experience. Here are three ways that marketers can leverage technology:



**Artificial Intelligence in marketing:** **Marketers can use AI** to establish effective customer communications. Based on consumer behaviour, AI can help businesses figure out what is the best way and time to reach them.



**Virtual Reality in marketing:** Both virtual reality and augmented reality can offer customers a more immersive and engaging experience, and enhance their connection with your brand.



**Chatbots in marketing:** Conversational marketing can help you understand consumer behaviour faster. AI-powered chatbots, for instance, learn from user experience and provide better and satisfactory responses to (repeat) queries to website visitors. Thus, chatbots have an impact on landing page conversions and search engine optimisation by understanding the intent of visit and guiding them to the right content.

As a marketer, you don't need to grope in the dark to make sense of the changing consumer behaviour and sentiments. Pivoting on technology and using the 3R framework outlined below, you can create a robust marketing strategy that will help you build flexibility and agility in your approach.



## Chapter 3

# The 3R Framework for the Now and After

A proposed framework to help marketers cope with uncertainties and make the most of emerging opportunities



### Reprioritise

- ▶ Reprioritise product categories to promote based on demand and help meet revenue targets.
- ▶ Re-categorise customers, according to the evolving economic situation. For instance, in B2B transactions, businesses can be in survival mode, static mode, or growth mode. The products you push – and the messaging – should be relevant to their current needs.
- ▶ Continually track the performance of marketing channels and adjust marketing budgets on an ongoing basis.
- And the most important, revisit your marketing communications. Remember, it is no longer about your products or solutions but all about the customer. And here is where practising empathy when communicating with consumers matters.



### Restructure

- ▶ Current marketing models are mostly performance-based. Think MROI, growth maps, and promotions. With a tectonic shift in consumer buying patterns for the long term, CMOs need to rethink their marketing models that prioritise loyalty and add value to consumers' lives.
- ▶ Restructure existing marketing models considering the changing consumer situations. For example, it might no longer be enough to incentivise consumers through promotions and program benefits to drive loyalty. Instead, taking an active part in socially relevant projects that build communities may drive a loyal following. The pandemic has upended people's lives, making them hyper-aware of their 'true' expectations from a brand. The key is to listen deeply to what consumers and communities expect from brands.



### Reinvent

- ▶ The future remains uncertain. Nobody is quite sure what behaviours might persist and if the pandemic will give rise to entirely new business segments. For example, could paid virtual tours via augmented reality (AR) be the new future for the travel industry? Could virtual car demos such as Mahindra & Mahindra's *Bring the Showroom Home*, where customers can experience the car virtually through VR and AR, become mainstream? What this sort of innovation also calls for is a strategic marketing approach. Vikram Garga, VP - Marketing, Mahindra & Mahindra, said the company now only reaches out to customers who have shown a keen interest in buying cars, instead of resorting to mass communication.
- ▶ Take a broader approach to buyer personas. Look for insights beyond your own industry. Move beyond the usual factors of demography and past purchase patterns to uncover trends before they become the 'new normal'.
- ▶ CMOs should not wait for trends to become widespread before they start adopting them. Marketing agility is about proactively looking at ways to innovate with the help of available technology. Predictive technologies and machine-led algorithms, for instance, can help marketers identify bestselling opportunities in real-time. Mapping consumer decision journeys during and after COVID-19 with the help of machine-led algorithms can uncover deeper insights into consumer behaviour and how it might be changing.

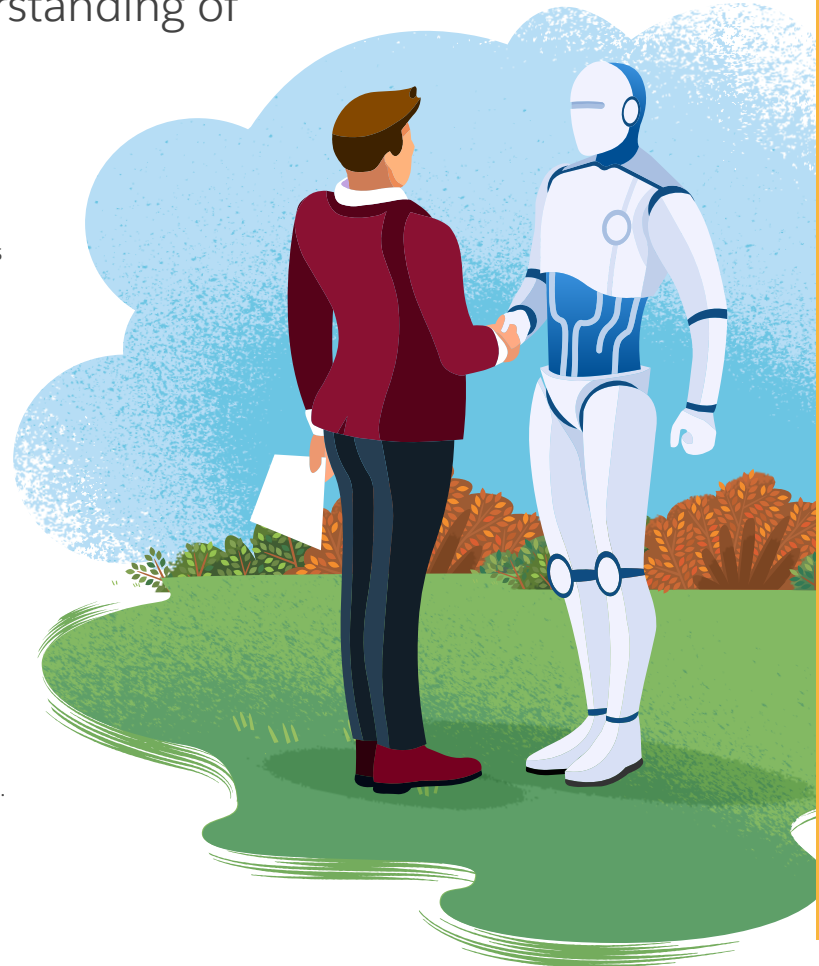
## Chapter 4

# Humanising Marketing to Build Deeper Connections

Understand that marketers can truly innovate only when technology-driven insight and human understanding of behaviours come together

Till technology and innovation kick in, companies won't have a single source of truth for customer data. Most often, they don't share unified customer data across business units, making it difficult to structure a cohesive customer journey across channels and devices. What CMOs truly need is an integrated platform of solutions that can evolve with the growing needs of marketers. **Salesforce Marketing Cloud** offers a bundle of solutions that empower marketers to address these changing times with relevant, empathetic digital marketing. Whether it is engaging with your customers across social channels or initiating targeted campaigns, the integrated marketing tools will enable you to look beyond the traditional approach to marketing and acquire new customers. By using Salesforce Marketing Cloud, you can ensure that customer journeys are continuous and unfragmented. You can micro-segment customer journeys with intelligent insights gathered from all that customer data residing on a single platform. You can hyper-personalise your communications, and more importantly analyse the impact of your outreach.

For brands, emotional connections, and the human touch will continue to stay relevant. But data will hold the key to meaningful connections with the customer. By using technology solutions that are data-driven, you can create winning customer engagements and superlative experiences that will set you up for growth.



## Chapter 5

# How IDFC Asset Management Uses Technology to Enable Seamless Customer Experiences



### Shwetal Kothari

Vice-President, Marketing  
IDFC Asset Management Company Limited

Online customer engagements have seen a rise in the recent past. Digital-first customers demand great experiences and meaningful conversations. However, brands often find it tough to stand out from the noise that surrounds online channels.

So, how can businesses think digital-first to succeed in the new age? Can Chief Marketing Officers (CMOs) efficiently plan communication in a hyper-personalised manner for each customer? Shwetal Kothari, Vice President of Marketing, IDFC Asset Management Company Limited (IDFC AMC) shares her take on the CMO's changing role and the need for context in every interaction.

## How are customers engaging with brands today, and what does this mean for the new-age CMO?

Brands all over the world have taken digital to an all-new level over the last few months. We are seeing consumers across age groups adapting to new digital behaviours. They want to imbibe these as a part of their day-to-day lives. So, businesses must think Digital First—in every sense.

Going forward, every customer interface will be digital-first. This is where the marketer's role becomes extremely critical. We are the business drivers of this transformation. CMOs must proactively identify the needs of customers in such times and fulfil them through our communication and content. As CMOs, we must unlearn our past experiences, and adapt to the new digital age and changes in customer behaviours.

While content is King, context is the Queen. You must sound relevant as a brand. Your communication must make a difference. Today, the key to building long-lasting relationships with customers lies in having meaningful conversations with them. There is a barrage of information out there, being thrown at the customer. You need to break through that noise and clutter to truly engage them and win their loyalty.

And I feel you can do that with hyper-personalisation, where your meaningful content can make a difference in the customer's life on a day-to-day basis.

## How does IDFC Asset Management engage with customers from a hyper-personalised perspective?

At IDFC Asset Management, technology plays a lead role—not just for our external customers who invest with us, but also our internal customers - our partners - who look after our customers' financial planning and wealth management. Our initiatives centre around data-based interactions that can enable sales process improvements and new cross-sell strategies.

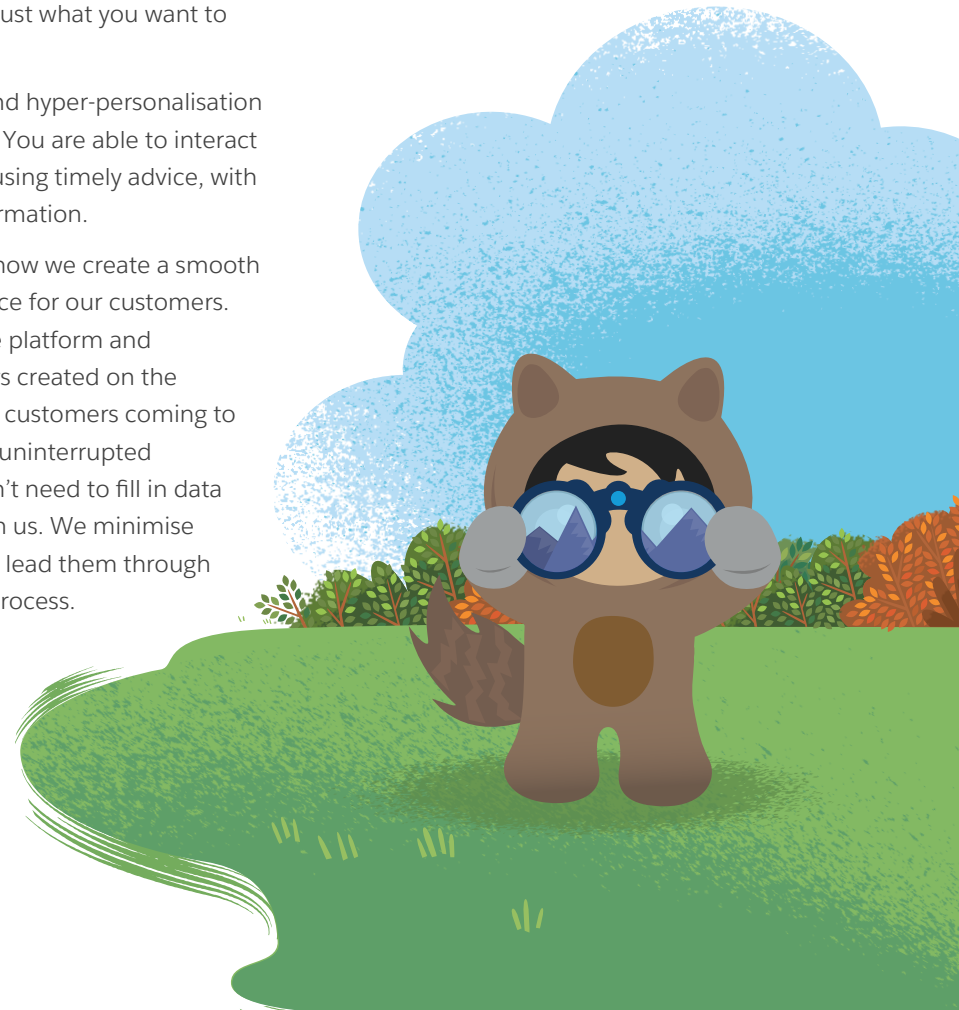
Let me give you the instance of monthly cross-sell and upsell campaigns for our existing investors. The traditional approach relies on the use of just the customer's portfolio holdings to make product recommendations. This can be a hit-or-miss approach.

In our case, we use data analytics models to understand industry behaviour, market trends, and the investor's past purchase behaviour. This provides predictive analysis about what a customer is most likely to buy. Or what the next best action for this customer could be, even if that means this investor should continue with their current investment products and not buy from you.

In many cases, such capabilities save you from providing irrelevant advice and allow you to truly think about what the customer's actual need is – not just what you want to push to them.

The power of data and hyper-personalisation come into play here. You are able to interact with your customer using timely advice, with the right kind of information.

Another example is how we create a smooth transaction experience for our customers. Use of the Salesforce platform and personalised journeys created on the platform ensure that customers coming to our website have an uninterrupted experience—they don't need to fill in data already available with us. We minimise customer inputs and lead them through a quick transaction process.



## Could you share more details on the success you have seen? And how you use technology to engage with your customers?

It is important that you reach out to your customer with the same message across different touchpoints. And these messages must come across as more of a soft nudge than a hard sell. At IDFC Asset Management, we do not want to come across as a brand that is trying to sell its products to the customer; we want to be their partners on their wealth creation journey. Through our communication with them, we want our customers to understand the long-term benefits of whatever we recommend.

For consistent, omnichannel communication, we use Salesforce Advertising Studio. Our most recent campaign using Advertising Studio has been for our customers whose Systematic Investment Plans have expired with us. We have been able to create a unified customer journey, orchestrating the entire experience—right from the time we send e-mails and SMS, all the way to targeted ads on social media.

The fact that we are sending out uniform and personalised, contextualised messaging has actually resulted in an overall improvement in open and click rates. We also saw a significant reduction in the overall unsubscribe rates.

Using Salesforce Marketing Cloud's analytics, we have also been able to analyse the performance of these campaigns. This has enabled us to make our communication more targeted and meaningful. As a result, we have witnessed an increase in our sales by up to 3x.

Our story is one example of what is possible when technology meets marketing. As CMOs tune their marketing efforts to enhance customer experience, contribute more strategically to business revenue, and think digital first—choosing the right technology will be critical. Real-time insights, accurate predictions, omnichannel data analysis, and integrated sales and marketing goals will be every CMO's must-have(s).



# Takeaways



## Put customers at the heart of all that you do

A *Forrester report* states that customer-obsessed companies enjoy higher revenue.



## Innovate to respond agilely to change

The pandemic accelerated customers adoption of digital everything. Only companies who were quick to recognise this change and respond fared well.



## Create superlative customer experiences

The latest *Salesforce State of Marketing Report states* 84% of customers say the experience a company provides is as important as its products and services.



## Leverage technology to personalise experiences with focused communications

*Salesforce Marketing Cloud* allows you to address changing times with relevant, empathetic digital marketing. Create a seamless experience across every customer touchpoint with integrated marketing tools. And speak to customers with the right message, in the right tone, at the right time.





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