



# 4 Steps to a Future-Proof Marketing Data Strategy





CONNECT  
CONNECT  
CONNECT



dreamforce

Thank you



HAVE FUN  
HAVE FUN  
HAVE FUN



GIVE BACK  
GIVE BACK  
GIVE BACK

# Your Speakers

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**Nia Coleman**

Mgr, Product Marketing  
Salesforce



**Allison Urffer**

Director, Marketing Data Intelligence  
Geisinger



**Emily Dalo**

Business Intelligence Analyst  
Geisinger

# Marketers are balancing a lot of data



Where should I spend my budget?

What's our most effective channel?

Am I driving the most effective experience?

How can I drive efficiency in my org?

Marketer

71%

of marketers evaluate cross-channel marketing performance in silos

92%

Of marketers spend a few days or more per month on manual data preparation

Multiple Regions, Business Units, Products

Multiple Goals, Campaigns, Channels, and Technologies

Paid Digital Ads



Paid Traditional Ads



Programmatic Ads



Agency Reporting



Email, Mobile, Social



Web and Mobile



Healthcare Systems



Any Data



# This leads to foundational data challenges

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## Complex Data Prep



92%

of marketers spend **days to weeks** every month preparing data

## Speed to Insight



only  
33%

of marketers strongly agree they gain insights fast enough for impactful decision-making

## Lack of Resources



#1

challenge in evaluating marketing performance is employee resources & skill sets

# Marketing Cloud Intelligence (Datorama)

## Improve Marketing Performance and Drive Business Impact

### Data Silos

- Advertising
- Email & Mobile
- Web and Apps
- Electronic Health Records & Systems
- Other Data Sources

Unified view of marketing performance

Real-time performance insights

Data-driven alignment & data governance

### Team Silos

- CMO
- Advertising Team
- Mobile
- Email
- Web / Demand Gen
- Marketing Analytics

98% of marketers emphasize the importance of having a complete, centralized view of all cross-channel marketing.

Multiple regions, business units, products.



# Create a marketing system of record with Intelligence



4 steps to building a strong data foundation



## Connect

Build a future-proof foundation for all your marketing data in one place

## Prepare

Unify and harmonize data into a consistent framework

## Analyze

Turn data into consumable insights with continuous optimization

## Scale

Extend your marketing insights and strategy to drive organizational alignment and impact



“Clicks not Code” for Marketers | Scalable, Performant Cloud Infrastructure | Rapid Implementation, Scalability, & Agility



# Allison Urffer

Director, Marketing Data Intelligence  
Geisinger



# Emily Dalo

Business Intelligence Analyst  
Geisinger

# Introduction to Geisinger



## Salesforce Footprint

Marketing Cloud  
Intelligence

Tableau

Health Cloud CRM

Customer Data  
Platform

Marketing Cloud  
Engagement

Marketing Cloud  
Personalization

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### Health Plan

600,000 members  
51,000 providers  
200+ hospitals in  
network

### Patient Care

10 hospitals  
133 clinics  
25,000 employees  
1700 physicians

### Education & Research

3000 students  
570 residents & fellows  
1400 active research  
projects

### Digital Engagement

Analytics  
Digital marketing  
Martech  
Website experience & web tech  
Internal communications  
Patient & Member portals





# Team Structure and Responsibilities

## Geisinger Analytics Center of Excellence

Support enterprise wide analytics strategy with marketing data as a supporting function

### Marketing Analytics

Patient Marketing

Health Plan Marketing



# Geisinger's Journey to Analytics Excellence



## Challenges

- 1 Siloed Data
- 2 Lack of KPI Clarity
- 3 Platform maturity
- 4 Ad Hoc collaboration



## Opportunities

- 1 Centralize Data
- 2 Align Marketing & Sales
- 3 Refine data model & infrastructure
- 4 Shared ownership across teams

# Journey to Intelligence

Where We Started & Where We Are Now

- TODAY** Current: Blended data with manual weekly reconciliation
- 2020** Datorama - managed APIs blended with manual leads and appointments reconciliation along with traditional spend and performance
- 2019** Incorporate Salesforce BI: Manual Tableau dashboards with leads and performance data
- 2018** Manual Integration: Static excel spreadsheets updated weekly - digital



# Geisinger leverages data to prove results



Results:

**75%**  
Quicker speed to insights

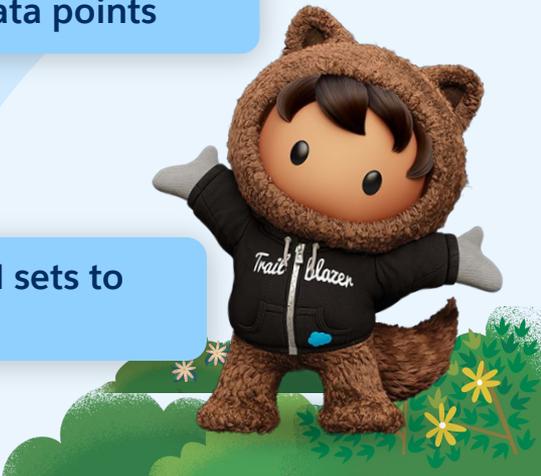
**120%**  
Increase in data granularity

**500%**  
Increase in headcount

Decreased manual time and effort to provide quicker speed to insights and flexibility mid-campaign

Increased data points from from 10 data points to slice and dice the data to 22 data points

Gained more staff and extended skill sets to increase marketing credibility

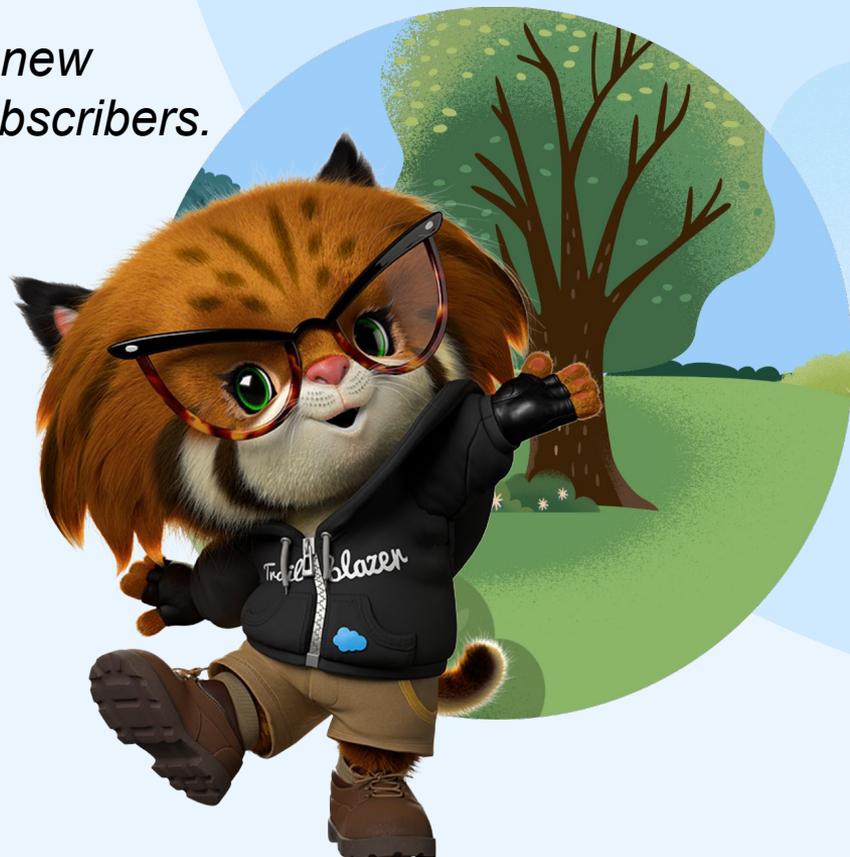


# What Is Medicare Annual Enrollment Period (AEP)?



*Time period when we will acquire most new members and work to retain existing subscribers.*

- Annually from October - December
- Medicare health and drug plans announce plan changes for upcoming year.
- Medicare subscribers can change health and drug plans for the following year.



# Outreach → Response → Enrollment



Who is responding to outbound marketing activities?

What marketing tactics are most effective in driving inbound responses?

What marketing channels are the most efficient lead generators?

What channels resulted in membership enrollment?



# Providing Stakeholders Daily Access to Data

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1

## Executive Views

CXO across sales, marketing, and enterprise monitor leads and members/revenue insights

2

## Marketing Leadership

Overseeing how specific channels and tactics are performing against budget and spend.

3

## Practitioners

Manage and blend data sources, monitor granular performance data daily, execute and optimize campaigns.

# Geisinger Gold Marketing Data Lifecycle



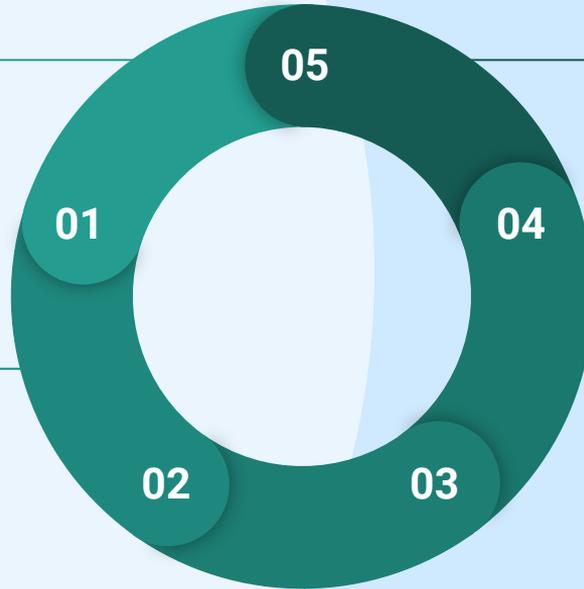
## 5 Steps to Optimize Reporting & Performance for the Annual Enrollment Period

### Strategic Planning

Leverage data from previous year to deliver campaign reporting & insights.

### Campaign Development

Drive new campaign development based on insights from strategic planning. Influence technical platform & data model to ensure we can measure outcomes.



### Activation

Campaign launches on digital and traditional channels with tactic level tracking so we can measure which channels were most effective & efficient in driving responses.

### Analytics & Reporting

Automated marketing dashboards are built in Marketing Cloud Intelligence.

### Lead Generation & Nurturing

Inbound marketing responses captured in CRM. Lead nurture follow up is triggered in Marketing Cloud Engagement. Opportunities are created in Health Cloud CRM for sales follow up.



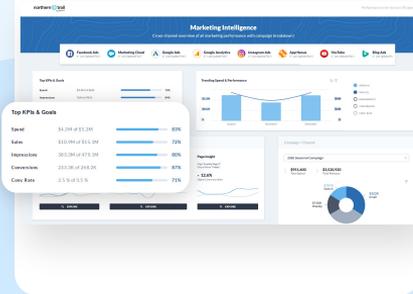
# Five core insights for the health plan

Using analytics to *prove* and *improve* campaigns

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## Consistent Budget Pacing

Did we go over/under budget consistently? If so, why?



## Spend Allocation & Tracking

Planned vs. actual spend?



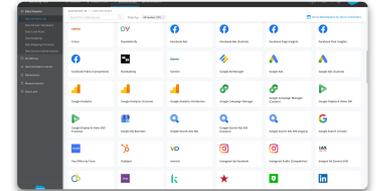
## Lead Gen Optimization

Am I hitting my lead goal as efficiently as possible?



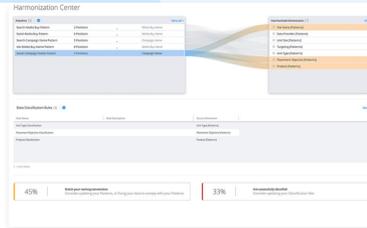
## Automated Data Integration

Accessible digital spend data, delivered consistently and integrated with other performance metrics in an automated way.



## Data quality and governance

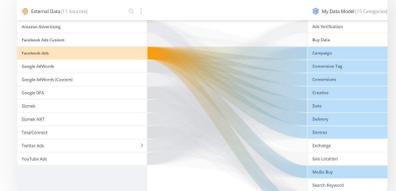
How do we know we can access and trust our data?



### My Data Model (15 Categories)

- Ads Verification
- Buy Data
- Campaign
- Conversion Tag
- Conversions

### Data Mapping Visualizer



# Journey to Intelligence

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## Future

- CRM foundational rebuild to better support the AEP sales and marketing process
- Blended member/patient/prospect data to better provide opportunity analysis
- Reliable data infrastructure for the broader Salesforce ecosystem
- Ability to leverage tableau clinical data blended with marketing performance data within Datorama
- Integrated data sets to provide clinical and health plan data blended with performance data to provide a 360 degree view of our consumers



# Recipe for Success with Intelligence



## Nothing is Impossible

*Map out your ideal world.*

*Then get creative with what you can accomplish!*

1

## Crawl, Walk, Run

*Take the first step and do what you can with what you have.*

*Do not let perfect be the enemy of good.*

2 *Celebrate small victories!*

## Take Time to Understand

*Some of our biggest improvements have come after truly understanding the complexity of upstream data sources.*

3

## We Are Never Finished

*Our data and dashboards will continuously change.*

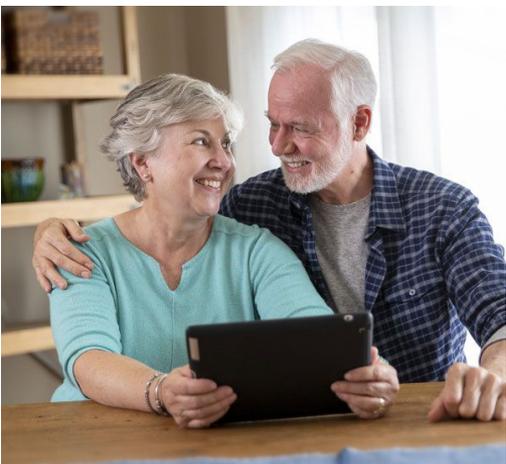
*Each season is a new opportunity for more improvements.*

4



Thank you





Geisinger



# Geisinger Transforms Measurement Strategy to Drive Personalized Messages

Creates a 360 degree view of campaigns to unlock their growth potential and reach all digital consumers with the most personalized messages

Gains full transparency into their marketing efforts with all data cleansed and organized in one place

Predicts seasonal trends and set realistic goals with historical data

**75%** Time saved on manual data prep



Allison Urffer,  
Marketing Research &  
Analytics Manager

“With Intelligence, we have a 360 degree view of the campaign, every tactic, keyword performance, landing page performance, performance to goal, and budget pacing. We now have that one-stop shop that we’ve been working towards.”



# Automated Data Integration

## Key Intelligence (Datorama) features:

Marketing API Library, Total Connect

## Results:

- Plug and play, no developers needed
- Ingest transaction, interaction, mail order data and more
- Transitioned from manual data pulls into Tableau to automated data ingestion in Intelligence
- Cuts down 2-3 hours a day to pull data



1

# Data quality and governance

## Key Intelligence (Datorama) features:

XXX

## Results:

- Decrease manual effort
- More resources and headcount
- Able to grow team of 1 to 5 technical and strategic analysts



2

# Lead Gen Optimization

## Key Intelligence (Datorama) features:

XXX

## Results:

- Save timed cleaning leads (Call center & Form Fills) and sharing out to stakeholders
- Change upstream sales process to ensure we measure and monitor the right things
- XXXX



3

# Spend Allocation & Tracking

## Key Intelligence (Datorama) features:

XXX

## Results:

- Equip stakeholders with insights on how to optimize campaigns
- XXX
- XXXX

# Quarterly Budget Pacing

## Key Intelligence (Datorama) features:

Media Planning Center, Media Transparency Center

## Results:

- Set Budgets & Targets
- Able to calculate ROI instead of manual number summations

# Team Structure and Responsibilities

## Marketing Strategy and Insights

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### Geisinger Analytics Center of Excellence

Support enterprise wide analytics strategy with marketing data as a supporting function

Business Intelligence

### Integrated Digital Engagement team

Includes channel performance measurement across web, martech, digital marketing

Primary Stakeholders

### Health Plan Sales & Analytics

Interface with teams to measure and optimize patient care experience and maximize performance during enrollment period

Digital Marketing

# Build 360 Customer Journeys Across All Campaigns



## Strategic Marketing Objectives

Maximize patient enrollment and care experience

- 1 Develop customer journey mapping process and implement across key areas
- 2 Rebuild and enhance Marketing CRM functionality
- 3 Extend our digital campaign maturity & execution
- 4 Redesign data analytics & reporting to support 360 customer journeys





# Team Structure and Responsibilities

Geisinger Analytics Center of Excellence  
Support enterprise wide analytics strategy with marketing data as a supporting function

Marketing Analytics

Clinical Enterprise  
Marketing

Health Plan Marketing

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# 4 Steps to a Future-proof Marketing Data Strategy

20 minute Theater Session 1867



Theater

[4 Steps to a Future-proof Marketing Data Strategy](#)

**MC Intelligence**

9/13 @ 11:30 - 11:50

Yellowstone Theater

(Moscone West, Level 2)

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Interview

Interview Snippets for  
Social Promo:

1. 30-second (Twitter)
2. 1-minute (LinkedIn)

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*\* interview questions are prepared in advance*

## Session Description

Marketing data is  
ever-evolving and complex.  
Learn how to connect,  
prepare, analyze, and scale  
your data with Marketing  
Cloud Intelligence.