

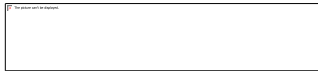
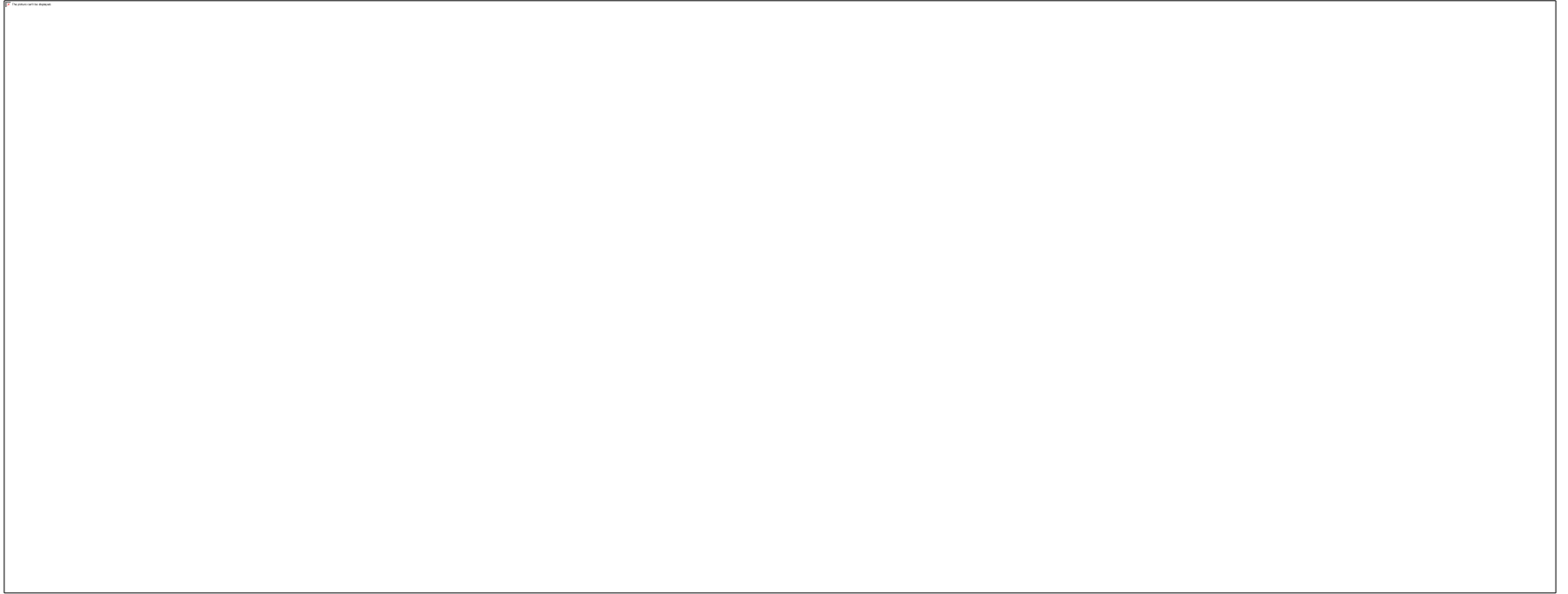
TOMORROW'S MARKETER

How to Engage your Customers, Stay Compliant, Make Legal Happy ... All While Maintaining your Sanity



Amanda Thall
Senior Marketing
Automation Strategist,
Marvel Marketers

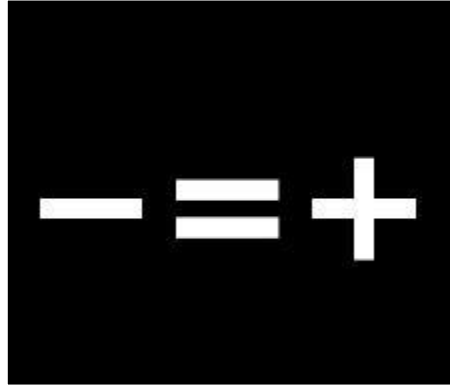
Situation: Your World is Limited



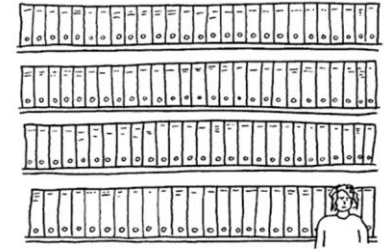
Four Truths of Working with Compliance



L&C believes your data is at serious risk at all times.

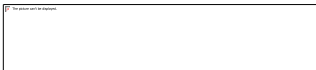


Less IS More!



THIS ONE THING I DESIRE: TO HAVE ALL OF MY PERSONAL PAPERWORK SENSIBLY ARRANGED IN LABELLED BOX FILES

Documentation will be your savior.



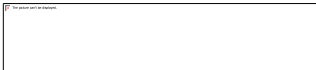
...and #4:

Not everyone uses email the way you think they do.



Email...It's not what you expect.

Mom, just put
your name down
and use ours.



Help Legal Sleep

What do they care about?



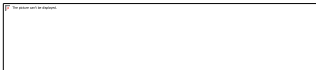
Don't get sued!



Don't pay fines or penalties!



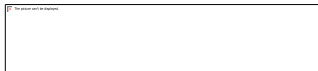
Don't misrepresent or mislead!



Sampling of Legal Questions

- What data do you need?
- Where did “your” data come from?
- Who has access to the data?
- Who can do what within the system?
- ...Et cetra, et cetra, et cetra...

- **What controls do you have in place to manage all of this?**



What data do you *actually* need?

System Integrations & Data

If you're accessing data from INTERNAL systems

- Less will be more
- Focus on what you need to move forward
- Basic demographics should be okay

If you're trying to append from EXTERNAL sources


- Good luck?
- Be ready with justifications
- Might need to live in a database outside Marketo

****TIP:** Keep your data requests limited to what you need

#MKTGNATION

What data do you *actually* need?


Syncing Across Internal Systems



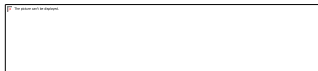
Partner across teams.



Use a middleman.



Create unique identifiers.



Just a Note on Unique Identifiers

Email may NOT be required across the company.

Use data on available to create your own unique keys.

- LastNameFirstNameStreetAddressBirthday
- FirstInitialLastNameBirthday
- LastNameFirstInitialZipCode

****TIP:** Unique identifiers will help access and align data across systems

#MKTGNATION

Who can access the data?

Controlling internal access and how to explain it.

Name	# of Us...	Partitions	Language	Description
DCOMM	32	DCOMM*, Marketing	English	Used by DCOMM for media email tracking
DCR	32	DCR*, Marketing	English	Used by DCR for Pharma communications
Falcon	32	Marketing, Physicians*, Physicians - DVA, VCOMM	English	
Hospital	32	Hospital*, Marketing	English	Used for Hospital communications
International	32	International*, Marketing	English	Used for International Physicians and Nurses
IT	32	Marketing, Physicians, Physicians - DVA, VCOMM*	English	
Kidney Smart	32	Marketing, Physicians*, Physicians - DVA	English	Used for DVA physicians
NPS	32	International, Marketing, Physicians*, Physicians - DVA, NPS	English	
Operations	32	Anonymous, DCOMM, DCR, HCP, Hospital, International, Marketing, NPS, Operations...	English	Initial system lead partition and Center of Excellence

Workspaces are like mini-databases

- Leads don't live in more than one
- Control who has access to which mini-database
- Create different levels of access based on training completion

Roles and Workspaces:

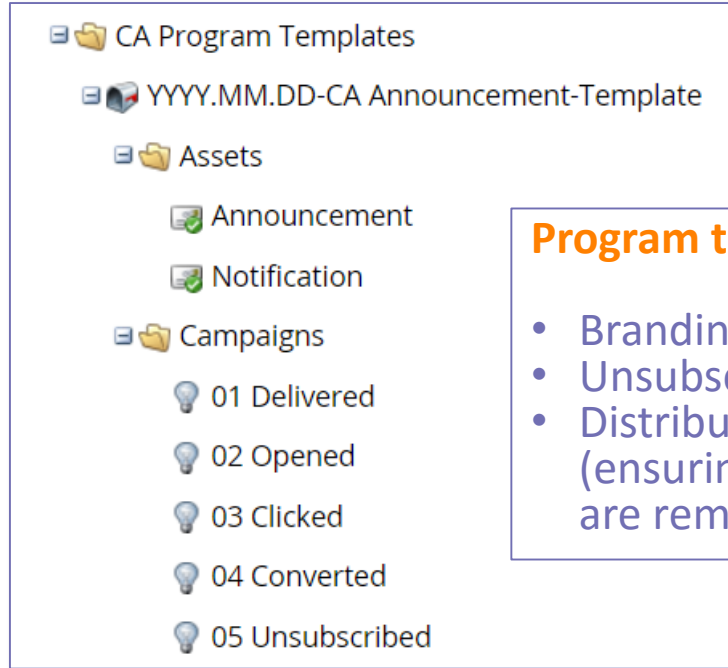
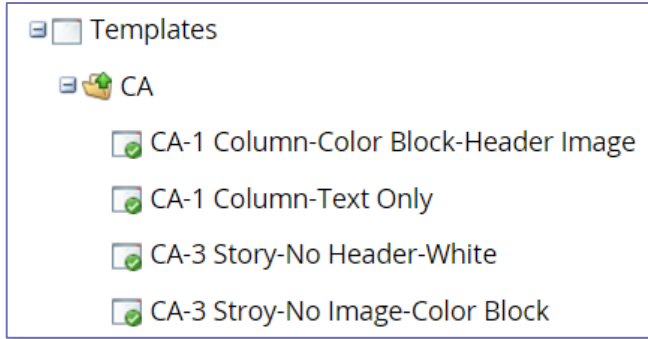
- Beginner User (0 of 13 workspaces)
- Marketing User (1 of 13 workspaces)
 - DCOMM
 - DCR
 - Falcon
 - Hospital
 - International
 - IT
 - Kidney Smart

****TIP:** Keep the language simple

#MKTGNATION

How do you manage what's delivered?

Templates. Templates. Templates.



Program templates control:

- Branding
- Unsubscribes
- Distribution lists (ensuring *excluded* names are removed)

Design templates secure:

- Branding
- Unsubscribe links
- Other regulatory items

****TIP:** Train your users to understand
WHY these are required

#MKTGNATION

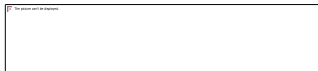
Meet & Greet with Legal & Compliance

Show and Tell

1. Meet in person if possible
2. Set the stage: You're in this together...because you are
3. Then show-and-tell for everyone
 - **From L&C:** Understand all their concerns and WHY
 - **From You:** Bring your documentation and expertise

UP NEXT! Real Life Example...Subscription Management

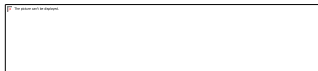
**Actual presentation included business specific terms that have been removed for demonstration purposes.



Subscription Management**

Overview

- Avoid Communication Fatigue and Overload
- Maintain current unsubscribe lists
- Avoid SPAM triggers
- Deliver relevant communications
- Legal Requirements
 - International Regulations
 - Double Opt-In Ready



**Actual Legal Team Presentation

Subscription Management

Methodology



ILLEGAL!

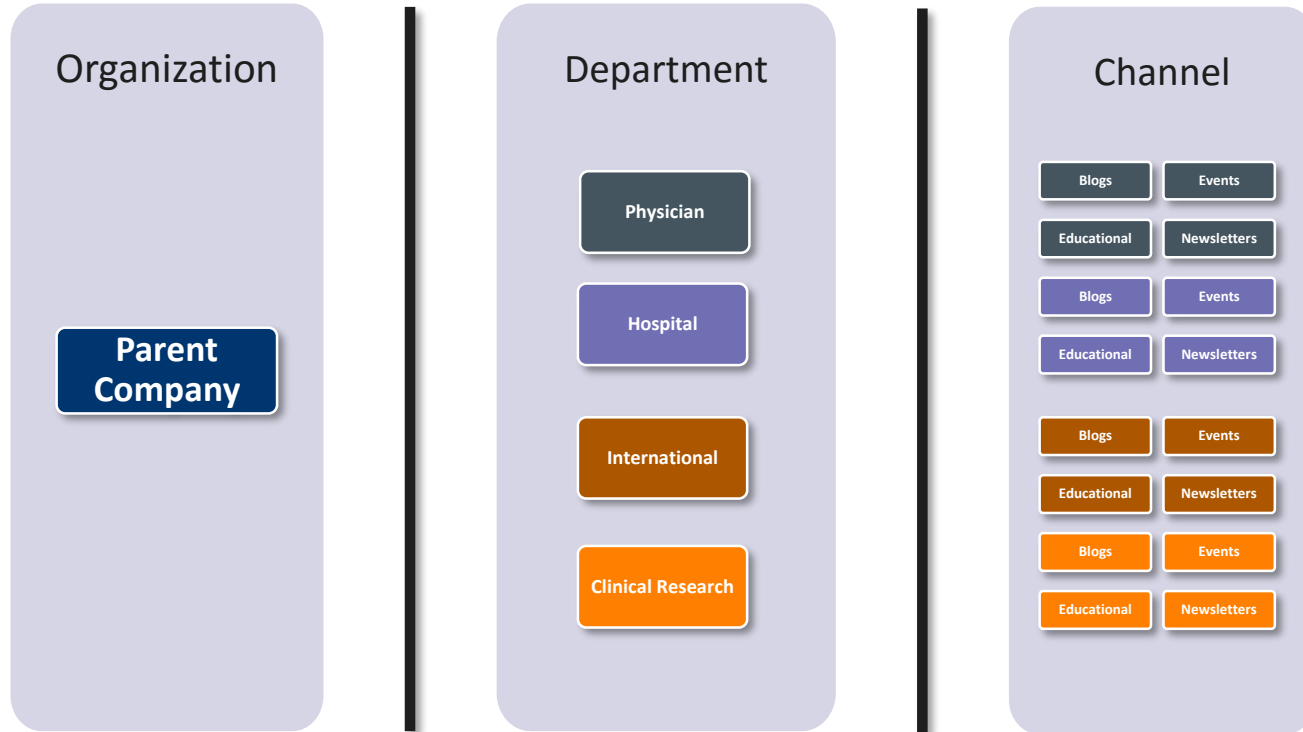
- All or nothing system
 - Unsubscribing removes you from all communications
- One-off lists for individual campaigns
- Disorganized, hard to track, not scalable

- Three-level system of subscription options
- Customizable and voluntary while being fully automated
- Dynamic lists
- Double opt-in process
- Best practice!

** Actual Legal Team Presentation

Subscription Management

Multi-level Subscription Options



**Actual Legal Team Presentation

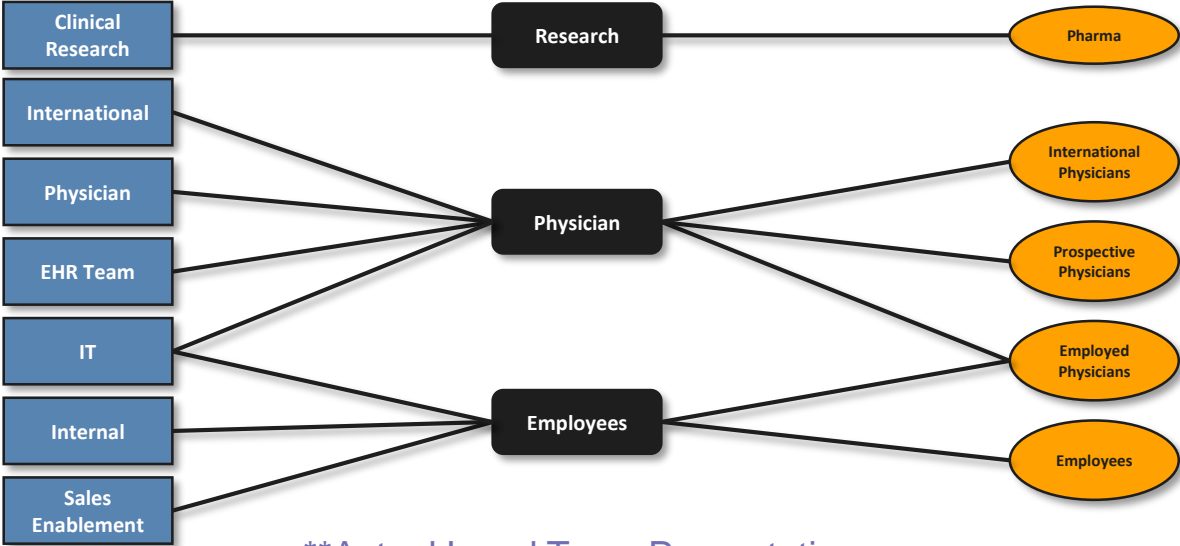
Subscription Management

Database Structure

Internal User Groups

Marketing Campaigns (Workspaces)

Audiences (Lead Partitions)



** Actual Legal Team Presentation



Subscription Management

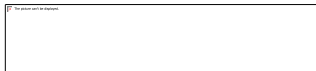
Smart Lists: Training for Email Send Management

The screenshot shows a user interface for managing subscriptions. At the top, there are controls for filters: 'Use ALL filters', 'Collapse All', and 'Expand All'. Below this is a green header bar for a selected filter: '1 - Subscribed-SRC-Events'. Underneath the header, a dropdown menu shows 'Subscribed-SRC-Events: true'. Below the filter bar is a grid of 28 smart list options, each with a play button icon. The options are organized into four columns:

- Column 1: Subscribed-DCR, Subscribed-DCR-All, Subscribed-DCR-All-Form, Subscribed-DCR-Blogs, Subscribed-DCR-Educational, Subscribed-DCR-Events, Subscribed-DCR-Newsletters
- Column 2: Subscribed-FAL, Subscribed-FAL-All, Subscribed-FAL-All-Form, Subscribed-FAL-Blogs, Subscribed-FAL-Educational, Subscribed-FAL-Events, Subscribed-FAL-Newsletters
- Column 3: Subscribed-NPS, Subscribed-NPS-All, Subscribed-NPS-All-Form, Subscribed-NPS-Blogs, Subscribed-NPS-Educational, Subscribed-NPS-Events, Subscribed-NPS-Newsletters
- Column 4: Subscribed-SRC, Subscribed-SRC-All, Subscribed-SRC-All-Form, Subscribed-SRC-Blogs, Subscribed-SRC-Educational, Subscribed-SRC-Events, Subscribed-SRC-Jobs, Subscribed-SRC-Newsletters

- Include Subscribed-XXX-CommType
- Then any other filters/triggers required for your campaign

**Actual Legal Team Presentation



Documentation hand-off

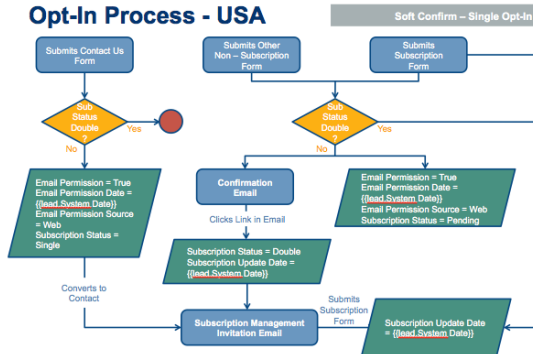
Delivered at the Meet and Greet

Content Includes:

- Overview & Approach
- Explanation of cross-functionality with integrated software/platforms (SFDC)
- Outline of testing approach
- Definition of Soft-confirm Single Opt-In

Appendix.... (the most important)

- Sample subscription pages from other companies
- Sample Opt-In language and confirmation emails from other companies
- ****Opt-In Laws and Permissions**
 - Document the laws, permissions, and provide links to the legislation...FOR EVERY COUNTRY



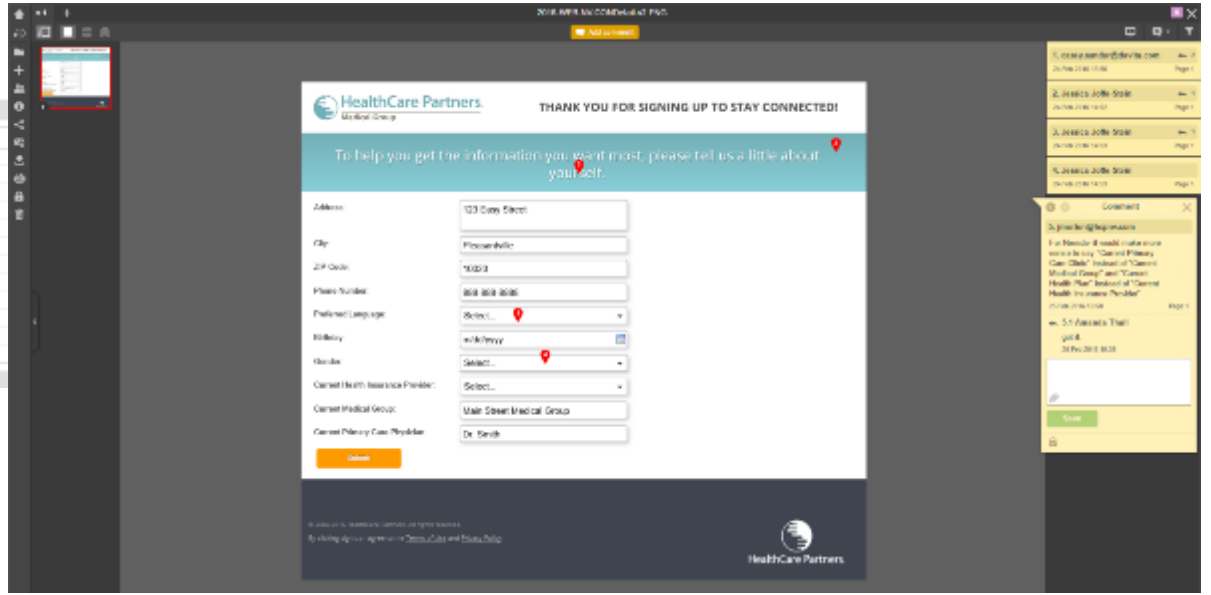
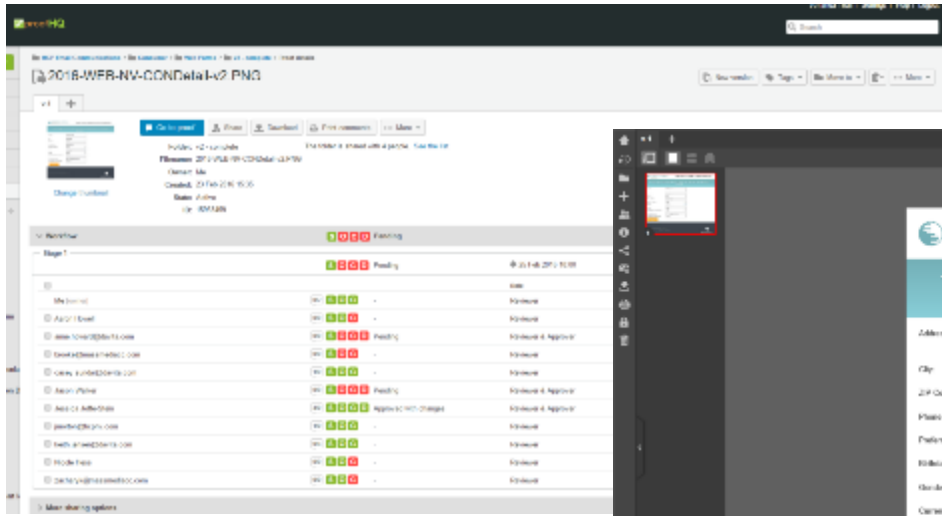
Now that L&C are your friends... Focus on what matters most!



...and all those other objectives, KPIs, goals, initiatives, content, strategies...

#MKTGNATION

Compliance-friendly creative approvals



****Tip:** Include ALL reviewers and stakeholders, including L&C. (eliminates individual pushback)

#MKTGNATION

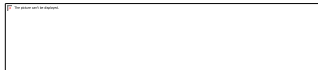


Your Goals, Objectives, and KPIs

Marketing as usual....
But remember these folks.

Most importantly:

Think OUTSIDE the box.
Be clever and excel where you can.

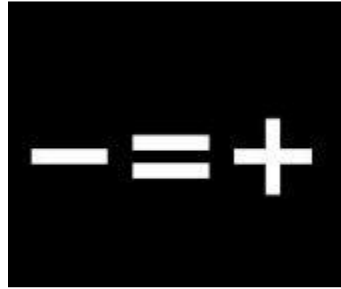


L & C Summary

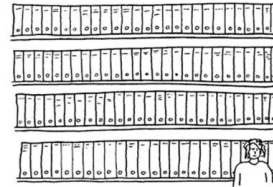
Four Truths:



Data security is #1.



Less IS More!

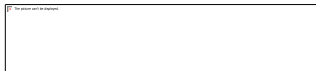


THIS ONE THING I DESIRE: TO HAVE ALL OF MY PERSONAL PAPERWORK SENSIBLY ARRANGED IN LABELLED BOX FILES

Documentation
will be your savior.

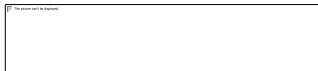


Watch for the
outliers.



Tip Summary

1. Remember the Four Truths
2. Limit your personalization
3. Base engagement on activity (when possible)
4. Keep you data requests limited to what you need
5. Create unique identifiers for cross-system data alignment
6. Train your users to understand WHY templates are required
7. Keep your conversations with legal in laymen's terms
8. Include ALL reviewers and stakeholders, including L&C, in shared reviewing tool
9. Think OUTSIDE the box – be clever and excel where you can
- 10. Know that you're doing more for them than they've ever had before!**



TOMORROW'S MARKETER

Thank You!

