



# MULTICHANNEL MARKETING AND COMMUNICATIONS PRIMER FOR 2018

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# SUMMARY

With the right tools, talent and data, marketing leaders can deliver personalized, real-time, multichannel engagements for growth. Our multichannel marketing and communications research shows how to fortify customer relationships and align multichannel efforts to exceed business goals.

## Scope

Multichannel marketing constitutes purposeful, mutually orchestrated engagements, across digital and traditional customer touchpoints.

It includes:

- Comprehensive understanding of customers behaviors, attitudes and actions
- Rules and intelligence for engagement timing and targeting at the right moment in the customer journey
- Automation and scale of multichannel marketing execution

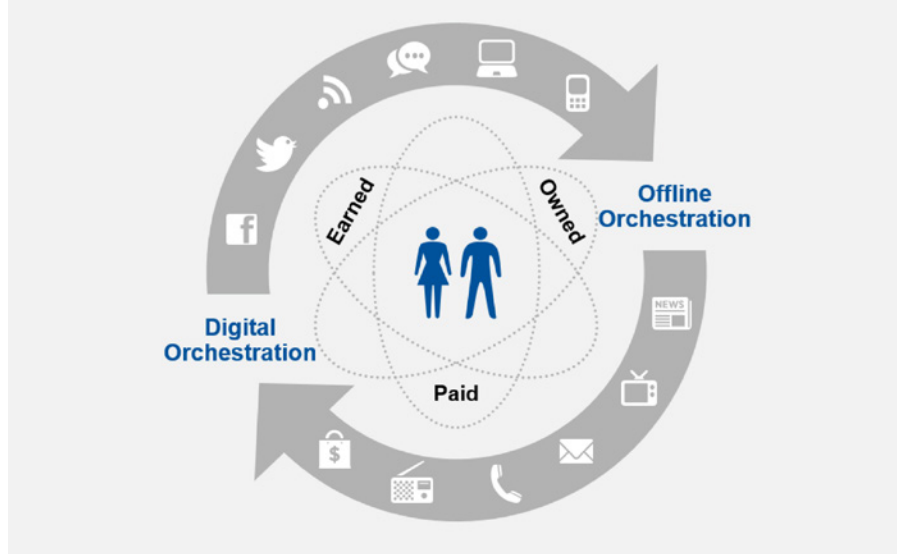


**Fortify customer relationships  
and align multichannel efforts  
to exceed business goals.**

Published: 10 January 2018  
ID: G00344144

# ANALYSIS

Figure 1. Multichannel Marketing and Communications Overview



Source: Gartner (January 2018)

Marketing leaders are growing revenue through customer engagements across multichannel marketing, including digital commerce, social media, mobile marketing and the Internet of Things (IoT). Yet, many companies' ability to convert these connections into purposeful, cohesive, ongoing company/customer engagements falls short of expectations.

Marketers who used our “[Gartner’s Marketing Maturity Assessment](#)” in the first half of 2016 rated their overall multichannel marketing maturity as the second-lowest among nine categories, assigning it a score of 1.8 on a 5-point scale (see “[Gartner Marketing Maturity Assessment: Top Five Findings](#)”). However, maturity appears to be advancing. Gartner’s

Multichannel Marketing Effectiveness Survey 2017 indicates that marketing leaders have been progressing in their multichannel marketing capabilities, with 69% of respondents characterizing their multichannel marketing maturity as Level 3 or Level 4. (See “[Multichannel Marketing Effectiveness Survey 2017: Marketers Are on a Mission to Advance Multichannel Marketing Results.](#)”) Whereas only 20% put themselves in the most mature category, this is still nearly double the respondents who view themselves as Levels 1 or 2.

Still, many marketers report multichannel marketing as one of the biggest gaps between their current state and their desired level of maturity. Whether you call it multichannel campaign management, cross-channel or omnichannel marketing, and regardless of whether your efforts involve a CRM or a customer data platform, success means delivering a unified customer experience across the right channels. Performance metrics hinge on the ability to share data and coordinate engagement across multiple teams. Orchestration (the planning and design of engagement delivery across a complex customer journey) is crucial for B2C brands as well as B2B brands pursuing account-based marketing or sophisticated lead management initiatives.

Lead your team’s growth efforts this year by strengthening multichannel marketing operations. Appoint a multichannel marketing leader — an influencer with in-depth knowledge of each channel and its unique role in a connected, orchestrated conversation (see “[Identify a Multidimensional Marketing Leader for Multichannel Marketing](#)”). Build a team aligned to customer segments and supported by the right mix of skills. Prioritize customer data integration, connecting with customer service, sales, digital commerce and other customer-facing functions to extend real-time interactions via established and emerging channels. Adopt tools and technologies best suited to meet your company’s business goals, and help scale multichannel operations for sustainable results.

## Top Challenges and How Gartner Can Help

Gartner's 2018 research for multichannel marketing and communications will help your organization strengthen customer loyalty and advocacy by better understanding your customers. Use this research to align your multichannel marketing efforts to data-informed customer personas, strengthen your team's capabilities and demonstrate a direct impact on bottom-line results. This multichannel marketing and communications research will help marketing leaders answer the following questions:

### How can you get a comprehensive understanding of your customers?

Effective multichannel marketing means engaging in relationship-building, goal-oriented conversations with customers where they are, at key moments of interest. Audience and customer data fuel those engagements, empowering marketing leaders to act faster in the moment, across customer-preferred channels. You need strong persona and segmentation development and refinement along with access to first-, second- and third-party data sources to keep up with customers' evolving needs and wants. Understand the context of each engagement in each channel to recognize, predict and take action — increasingly in real time — on key customer insights.

## Planned Research

- **What Multichannel Marketers Need From Customer Data Platforms:** When orchestrating numerous customer engagements across multiple touchpoints, success relies on the multichannel marketing strategies and technologies at your disposal. The same tenet applies when you're managing and distributing multiple forms of customer data. Use this research to understand these evolving technologies and inform your expectations for customer data platforms within multichannel marketing efforts.
- **Segmentation Advances That Will Improve Multichannel Marketing:** Traditional segmentation attributes focus on products. Who bought and who is likely to buy? Newer groupings focus on profitability, applying improved criteria for increasing segment value. Other strategies focus on grouping personas, life cycles and lifestyles. Use this research to identify the multiple approaches and best practices for leveraging each one.
- **Prospect Personas to Customer Personas and Drive Multichannel Marketing:** Proper profiles can take you from single conversion insights to true multichannel customer engagement. We'll show you best practices for tailoring downstream activities based on conversion insights, particularly when they would otherwise have been discarded.
- **Predictive and Real-Time Decision Making in Multichannel Marketing:** Predictive analytics and real-time, decision-making tools can identify customer needs and take action at precise moments. Use this research to compare and contrast predictive and real-time, decision-making capabilities within multichannel offerings and learn how to take advantage of them.

## How can you align multichannel marketing and communications initiatives to business goals?

Successful multichannel marketing and communications initiatives increasingly rely on automated, real-time engagement. Strengthen the components of your multichannel marketing mix for business goal alignment, including awareness, conversion, loyalty and advocacy. Prove the value of each engagement by using multiple approaches to channel attribution. Understand key and supporting roles of each channel across a buying process. Establish and build toward success milestones to justify the mission-critical contribution of multichannel marketing to senior management.

### Planned Research

- **Maturity Model for Multichannel Marketing:** Many marketing leaders see a gap between their current and desired multichannel marketing maturity. Advanced multichannel marketing programs build customer relationships, nurture advocates and provide steady customer data intelligence. Use this maturity model to assess the best investments for maximum impact.
- **Why Your Email Marketing Workflow Is Holding You Back From Multichannel Success:** As marketers seek to increase personalization across channels, they may place too much emphasis on email content personalization and the workflows that support it. As other channels gain 1:1 capabilities, you need a more flexible workflow and campaign approach. Use this research to up-level your processes and achieve campaign effectiveness at scale.
- **What Multichannel Marketing Needs From Customer Journey Analytics:** Marketing leaders working on multichannel initiatives need to track and analyze the way that customers and prospects use a combination of available channels to interact with an organization over time. Employing customer journey analytics capabilities should capture the efficacy of the multichannel nature of customer engagement, including human interactions (e.g., a call center), digital marketing (e.g., website, app and email), customer service (e.g., live chat), physical locations (e.g., retail stores) and those with a limited two-way interaction (e.g., display advertising).
- **Give Credit Where Credit Is Due: Channel Attribution Strategies, Tools and Approaches:** Attribution is a thorny issue for multichannel marketers, replete with gaps in methodologies. As customer journey-centric marketing becomes the norm, use the insight Gartner offers in this research to learn how to tackle attribution and what tools and approaches to use.
- **The Gartner Loyalty Management Vendor Guide:** A key goal of multichannel marketing programs is the orchestration of long-term, profitable conversations with customers. Loyalty marketing platforms support this goal through mechanisms such as loyalty cards, membership rewards, discount clubs, advocacy, promotions, offers and referrals. These platforms may also enable general-purpose personalization capabilities, such as “next-best” offer. Use this research to understand the key players in this space and how they approach loyalty marketing.

## What are best practices for multichannel marketing and communications?

Gartner analysis, examining more than 250 multichannel marketing initiatives, reveals that the best predictor of high performance is the nature of the core idea, or insight, behind the initiative. However, a good idea alone is insufficient. To achieve best practices in multichannel marketing and communications, marketing leaders must continuously improve upon the integration and coordination of messages across channels.



**Continuously improve upon the integration and coordination of messages across channels.**

## Planned Research

- **Build High-Performing Multichannel Marketing Initiatives:**  
Today's best ideas don't just resonate with customers, but instead, they tap into current debates by challenging cultural norms (B2C) or key business problems (B2B) in a way that links back to the brand. This study explores how to develop breakthrough insights for multichannel marketing and launch them in a way that achieves immediate customer resonance.
- **Build a Multichannel Marketing and Communications Process to Achieve Relevance and Scale:** As digital, mobile and social become more "native" to customers, marketing's ability to drive impact through paid media is steadily declining. Marketing teams that don't aggressively shift the way they develop communications will lose out to the competition. This research explores how leading marketers use earned, owned and shared media to scale multichannel marketing.
- **Support Personalized Multichannel Communications Delivery:**  
Leading brands realize that effective delivery of personalization depends as much on marketers' skills and behaviors as on technology (or even level of spend). This research explores how high-performing marketing teams have identified and built new capabilities to support personalized message delivery.

## When evaluating multichannel marketing technology and service providers, which criteria should guide your choice?

To effectively support multichannel marketing and communications, marketers need a comprehensive technology infrastructure that includes both automation and services. That infrastructure consists of multichannel campaign management applications with access to multiple data sources. These sources must be available in real time and connected to additional marketing applications, such as digital asset management and content marketing platforms and predictive decision-making tools.

Connected applications, drawing on a pool of connected data, help orchestrate and execute engagement across multiple marketing channels, such as mobile, email marketing, search, ad networks, the emerging IoT and digital assistant space. Cut through the hype of many promising, but still evolving technologies, and focus on core capabilities first. Execute the basics well, then add in other channels and technologies, building on a strong foundation.

### Planned Research

- **Magic Quadrant for Multichannel Marketing Hubs:** Multichannel Marketing platforms and applications continue to evolve with new entrants, new access and emphasis on customer data profiles built for marketers and new channels to extend a connected conversation. Use our research to get visual framework, in-depth analyses and actionable advice for a comprehensive look at a market's direction, maturity and participants.
- **Market Guide for Email Marketing:** Mature, yet still cost-effective, highly efficient and measurable, email marketing remains a staple for marketing leaders. Use our Market Guide to identify providers that can execute or optimize your email campaigns.
- **Critical Capabilities for Multichannel Marketing Hubs:** Customers expect relevant, connected conversations throughout the buying journey. Multichannel marketing hub vendors are responding with

enriched customer profiling capabilities, advanced analytics and automated personalization capabilities. Marketing leaders can use this research to evaluate their organization's current multichannel marketing assets and identify new solutions aligned to business goals.

### Related Priorities

Priority	Focus
Mobile Marketing	Successful mobile marketing uses valuable data emitted by mobile devices while balancing effective microtargeting of audiences with overwhelming prospects and customers with interruptions.
Advertising	Advertising encompasses the creation, delivery and orchestration of paid marketing messages and content across channels.
Social Marketing	Social marketing involves listening to and engaging customers, distributing content and cultivating brand advocates. It can increase awareness, consideration, conversion and advocacy.
Customer Experience Strategy and Design	Customer experience management is the practice of designing and reacting to customer interactions to meet or exceed their expectations, leading to greater customer satisfaction, loyalty and advocacy.
Content Marketing and Management	Content marketing and management focuses on creating, distributing and amplifying content via digital and offline channels. This content fuels audience engagement to achieve organizational goals.
Leading and Managing Marketing	Leading and managing marketing involves setting strategy, structuring teams, sourcing and developing talent, and aligning people, processes, partners, data and technology to achieve corporate goals.

Source: Gartner

# GARTNER RECOMMENDED READING

## Suggested First Steps

[“Maturity Model for Multichannel Marketing”](#)

[“Five Steps for Event-Triggered Multichannel Marketing”](#)

[“Identify a Multidimensional Marketing Leader for Multichannel Marketing”](#)

[“The Multichannel Marketing Leader’s First 100 Days”](#)

## Essential Reading

[“Magic Quadrant for Multichannel Campaign Management”](#)

[“Critical Capabilities for Multichannel Campaign Management”](#)

[“Why Marketers Choose Multichannel Campaign Management Platforms”](#)

[“Gear Up for the Evolving Multichannel Marketing Landscape”](#)

[“How to Manage the Challenges of Distributed Marketing”](#)

[“Crawl, Walk, Run: Define Your Vision and Roadmap for Personalization”](#)

[“Synchronize Campaigns and Continuous Engagement With Two-Speed Marketing”](#)

[“Prepare Your Multichannel Marketing for the Internet of Things”](#)

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## Digital has redefined the role of marketing, adding new players and creating bigger complexities

Gartner for Marketers helps you get up to speed on and stay smarter in the eight marketing areas that matter most: social, mobile, multichannel and data-driven marketing, digital commerce, customer experience, marketing management, and emerging marketing technology and trends. Our clients say that they use our real-time, expert advice and objective research, data and tools to:

- Target the right audiences
- Choose the right channels
- Quickly shortlist marketing and technology providers
- Stay informed on market and competitors
- Save time and avoid costly mistakes

Gartner helps companies improve their business results through the use of technology. Our independent research and advice is trusted by business and technology leaders in more than 10,000 distinct enterprises around the world.

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