



The CRM Retargeting Handbook



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Executive Summary: Defining CRM Retargeting

CRM retargeting is a way for you to use your CRM data (like hashed emails and phone numbers) to match customer segments with targeted campaigns whenever they log-into online platforms like:



facebook



twitter



youtube



google search



email

Using CRM retargeting, you can:



Reach inactive customers where they are paying attention.



Reinforce messaging among your most engaged customers.



Target cross-device customers with 100% accuracy.



Onboard offline customer data for improved attribution and personalization.

Here's how it works:

1. You choose a customer segment (like Openers or Lapsed Customers) and "hash" this data using a **hashing algorithm**.
2. You upload the customer segment with targeted campaign assets (flight dates, creatives, bid amounts) into a CRM retargeting platform.
3. The CRM retargeting platform finds a match with your customer segment.
4. If the campaign wins the bid, the creative is shown to the matched customer.

This handbook will dive deep into how you can use CRM retargeting, the problems it solves, and all of the platforms and partners available for implementing campaigns.

Revisiting 'The CRM Retargeting Handbook'

The **CRM Retargeting Handbook** was released back in 2014, when **CRM retargeting** was a new technology with fairly limited adoption. At the time, only Facebook, Twitter and LiveIntent made it possible to match CRM segments across their platforms, and the majority of marketers had not yet embraced it as a solution.

Since then:

Google has launched Customer Match for Gmail, YouTube and Google Search.

Walmart, eBay, LinkedIn and Marketo have all introduced their own CRM retargeting solutions.

Marketing clouds like Salesforce, Oracle, IBM and Adobe have built CRM data segmentation tools specifically for use with certain CRM retargeting platforms.

Why?

Because, as [Daniel Newman wrote for Forbes](#), "By helping brands piece together hard consumer data and online behavior, CRM retargeting allows companies to know their customers better than ever before. Ads will become more relevant, and the results, presumably, more positive."

And CRM retargeting does it all without **cookies**.

For a long time, **cookie-based retargeting** was a staple for marketers. It gave them a channel other than Search in which they could deliver targeted messaging based on a customer's inferred interests and needs and performed 10x better than what they were seeing from untargeted display ads.¹ But as more people started using more devices to go online, cookies – a technology tied to devices and not people – began to falter.

CRM retargeting does not entirely replace cookie-based retargeting. It cannot match the immediate, automated nature of cookie technology (yet). In most ways, CRM retargeting is somewhere in-between cookie-based retargeting and email marketing. But the gap is closing, and the more the cookie crumbles, the more marketers turn to new solutions like CRM retargeting, and the more platforms shift their priorities to meet that need.

With this handbook, marketers will have an up-to-date, comprehensive guide to all the different platforms and use cases available now and in the near future.

Now. Let's get all up in it.



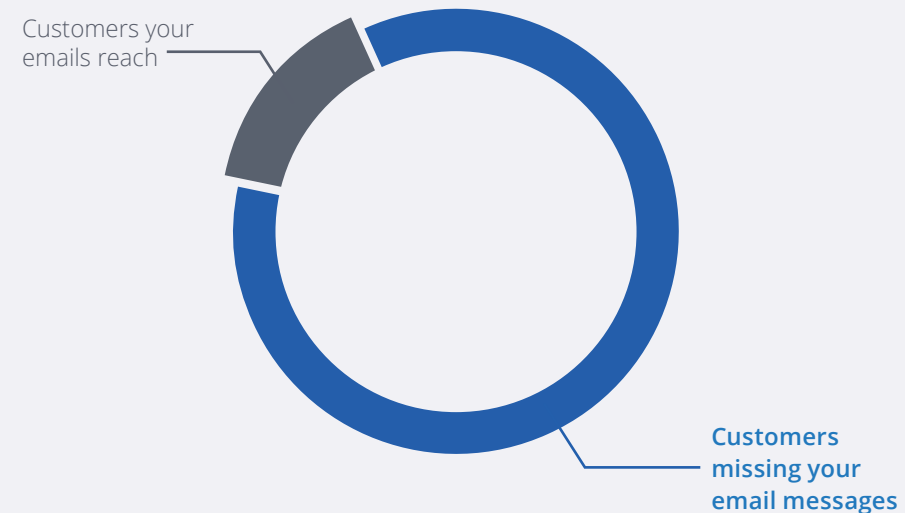
Nick Dujnic

DIRECTOR,
DEMAND GENERATION & EDITORIAL MARKETING
LiveIntent

You're not reaching 83% of your existing customers.

No one opens your email.


Well, not 'no one,' but with the average **email open rates** hovering around **17%**, you're **not reaching 83% of your existing customers.**²



For your customers, their email address is more than just a means of sending and receiving email. It's their online identity, their digital passport for accessing:

- Social media platforms, like Facebook and Twitter.
- eCommerce platforms, like Amazon.com and eBay.
- Media streaming platforms, like Netflix and Hulu.
- On-demand mobile services apps, like Uber and GrubHub.

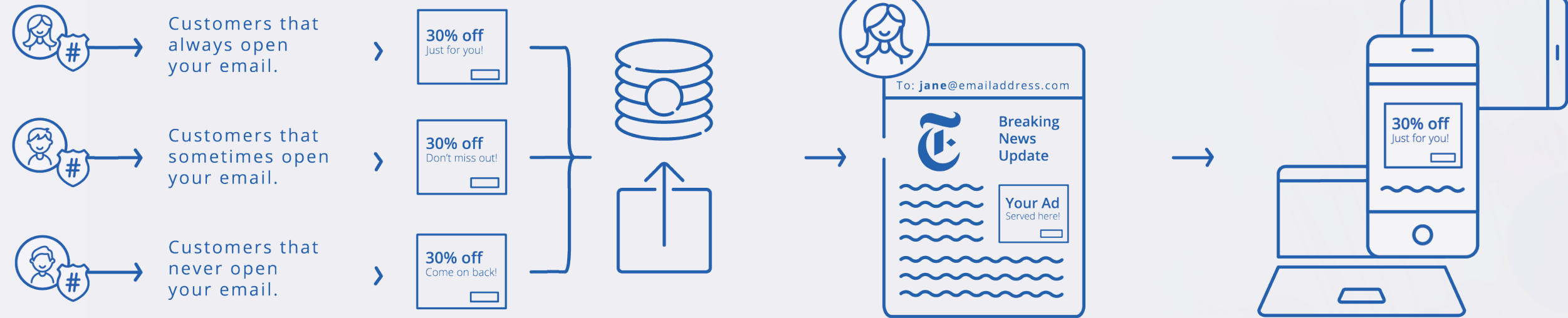
With CRM retargeting, you can increase reach among inactive customers as well as reinforce messaging among your best customers by matching customer segments with targeted campaigns in places they are paying attention, like Facebook or The New York Times email updates.

 [Learn more about how CRM retargeting increases reach and frequency in this video.](#)



Reach more customers, more often, without sending more email.

You have 3 segments of customers



You want to reach each of these segments with targeted messaging without sending them more email.

You upload these exact segments paired with the targeted message into a CRM retargeting platform, like LiveAudience or Facebook's Custom Audience

Your customers logs into Facebook or opens a breaking news update from The New York Times.

Your customers sees the targeted messages when and where they are most engaged.

So you increase the reach, frequency and effectiveness of your marketing campaigns without having to send more email. Certain platforms, like Facebook, set caps on frequency, so make sure to leverage your data in as many channels as possible.

Email and Facebook Ads Increase Reach by 77%

In a recent case study, an online retailer targeted 565,000 email subscribers with both its regular email marketing communications through Salesforce Marketing Cloud and coordinated Facebook News Feed ads. The online retailer found that:

Campaign reach was expanded by **77%**.

People who both opened and saw ads were **22%** more likely to purchase.

People who both opened and saw ads were **8%** more likely to click on ads.



Your customers' time is split across 3 devices and cookies can't follow.

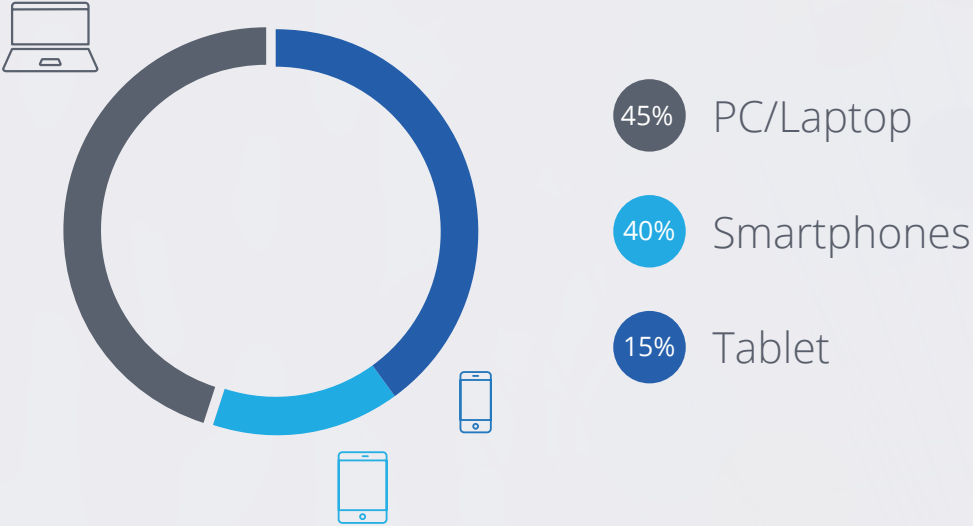
More people are spending more time online via more devices than ever before.

This is a major challenge for marketers, since cookies are tied to a single device and browser, rendering them ineffective in a new, cross-device world.

One solution is to use anonymous identifiers like **IP address**, **device IDs**, and **mobile apps** in conjunction with cookies to build **probabilistic models** for targeting customers across devices. But these have uncertain success rates, with reports of anywhere from **60 to 90 percent accuracy**⁶.

CRM retargeting allows you to reach your customers with **100 percent accuracy** across every device because it matches **deterministic IDs** (like hashed emails) that are tied to real people and are persistent across devices.

Internet time is divided evenly across devices³



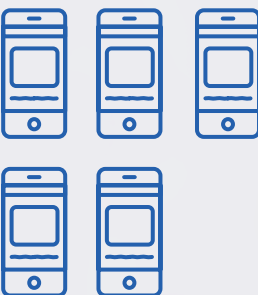
In 2015

the average person owned 3 connected devices⁴



By 2017

that number is expected to increase to 5⁵

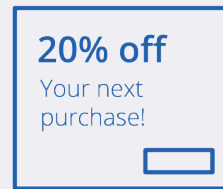


Target cross-device customers with 100% accuracy, without cookies.

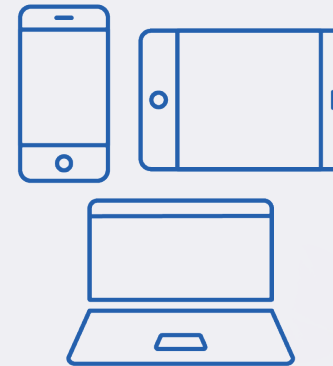


Tom

Tom gives you his email address, **tom@emailaddress.com**.



You include Tom in a CRM retargeting campaign offering 20% off his next purchase.



Tom uses that same email address to log into Twitter on his smartphone, tablet and laptop.



Tom sees the offer every time he signs into Twitter on his smartphone, tablet, and laptop.

Since the campaign is matching a deterministic ID (Tom's email address) to your message, you can be sure that Tom is going to see it, no matter what device he's using.

Online Home Décor Marketplace Reaches 1 Million Cross-Device Shoppers

In a recent case study, a home décor online marketplace used a cross-device campaign to reach shoppers that had signed up for their email newsletter but had not yet purchased. Using LiveIntent's CRM retargeting solution, LiveAudience, they were able to:

Reach **1 Million**
Cross-Device
Shoppers

Drive **450%** Return on
Ad Spend (ROAS)

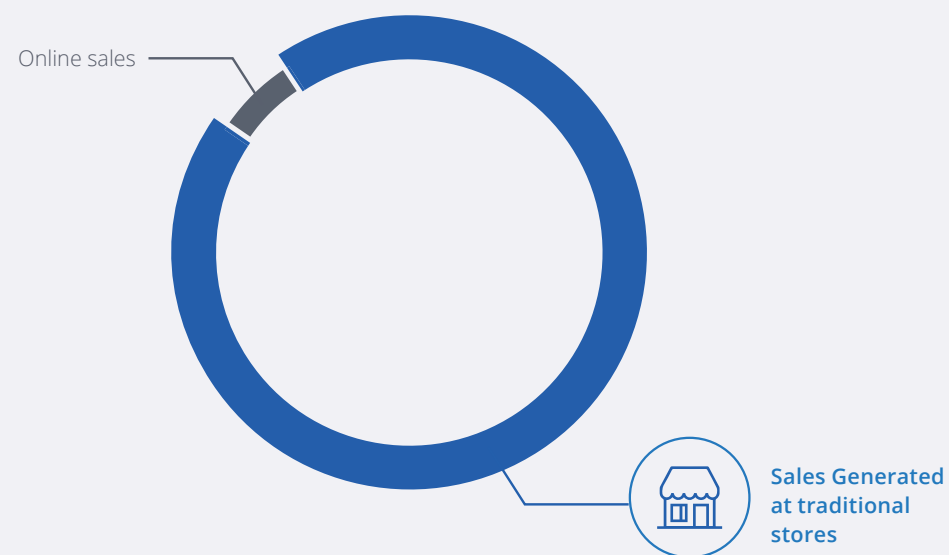
Exceed Target
ROAS by **13%**



Your customers are online, but 94% of purchases are in-store.

Most people still buy things in stores.

In fact, **94%** of total retail sales are still generated at brick-and-mortar stores.⁷



Despite the majority of sales happening offline, online digital interactions influenced 64 cents of every dollar spent in retail stores in 2015 – amounting to a whopping \$2.2 trillion total sales.⁸

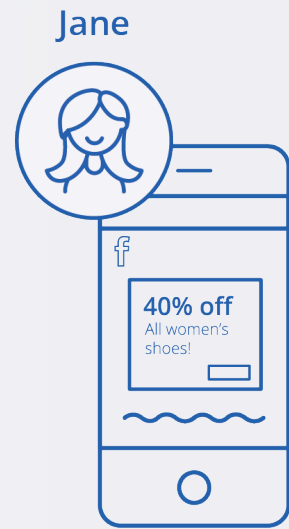
So how do you attribute marketing dollars spent online to the channels that influence these people when they buy things in stores?

By working with a **Data Onboarding Platform**, you can match your offline data (such as in-store purchases) to online data (like hashed email segments) being used in CRM retargeting campaigns.

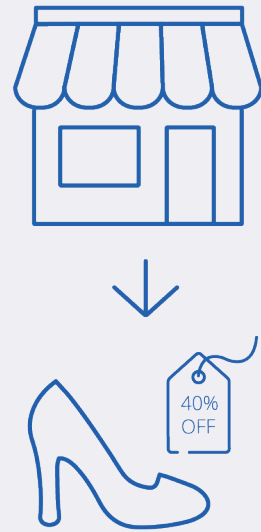
You can also use this offline data to enrich future CRM campaign segments for greater personalization.



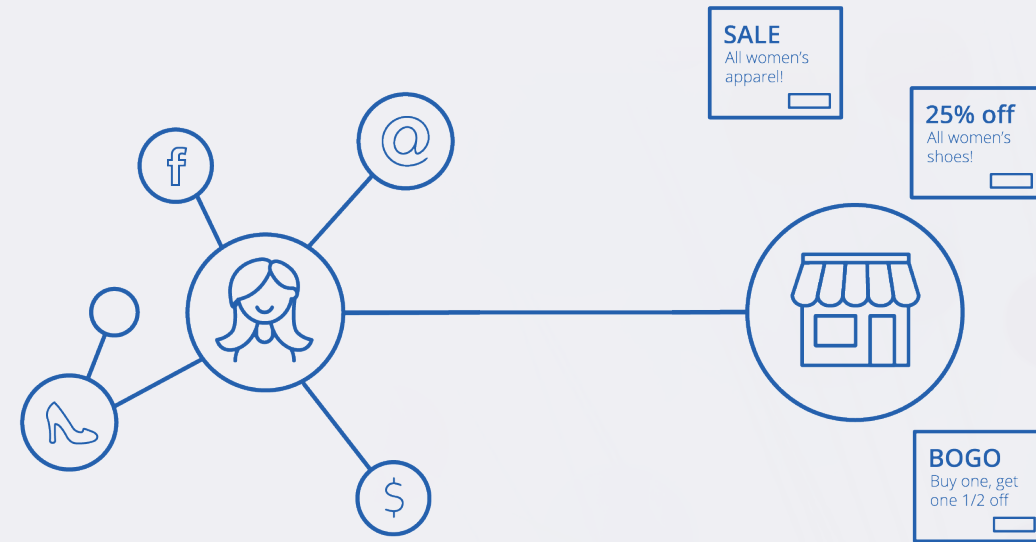
Connect online data to in-store sales for enriched attribution and personalization.



Jane sees an ad for discounted shoes from your CRM retargeting campaign while on Facebook.



Jane goes into the store and buys the discounted shoes.







Jane's purchase data is loaded into a data onboarding platform and matched to her hashed email address.

Jane's data is passed back to the marketer to be used for attribution and to tailor future campaigns to Jane.

While this process works with some platforms, others are **"walled gardens."** In these cases, they will allow marketers to leverage data for attribution and campaign performance within that platform, but will not pass data back to the marketers for use in other platforms.





CRM Retargeting Platforms

These are the logged in media platforms where you can reach your customers. Each has a tool for uploading your CRM data and matching it across their audiences:

				
CRM Retargeting Feature:	Google Customer Match	Custom Audiences	Tailored Audiences	LiveAudience
Channels	YouTube, Gmail, Google Search	Facebook	Twitter	Email
Active Monthly Uniques Worldwide	~3 Billion	~1.5 Billion	~307 Million	~120 Million
Active Monthly Uniques United States	~1.6 Billion	~217 Million	~66 Million	~108 Million
CRM Data	Email Segments	Email Segments, Phone Numbers, Mobile Ad IDs, Facebook IDs, 1st Party Cookies	Email Segments, Phone Numbers, Twitter IDs, 1st Party Cookies	Email Segments
More Information	google.com	facebook.com	twitter.com	liveintent.com

Marketing Clouds

These are marketing platforms that provide solutions for creating and managing CRM data segments that can be pushed into integrated CRM retargeting platforms for campaigns.

				
CRM Retargeting Feature	Active Audiences	Audience Manager	IBM Silverpop Engage	Oracle Responsys Connect
Channels	Email, Facebook, Twitter	LiveIntent*	Facebook, Twitter	LiveIntent*
Partners	LiveIntent, LiveAudience, Facebook Custom Audiences, Twitter Tailored Audiences	LiveIntent, LiveAudience*	Facebook Custom Audiences, Twitter Tailored Audiences*, LiveIntent, LiveAudience*	LiveIntent, LiveAudience*
Data Source	Stored CRM Data	Stored CRM Data	Stored CRM Data	Stored CRM Data
More Information	salesforce.com	adobe.com	ibm.com	oracle.com

*May not be available at the time you are reading this report. Projected delivery in 2016.

Data Onboarding, Management and Retargeting Platforms

These are platforms where you can upload, manage and segment CRM data (including offline data, cookies, and emails) for retargeting across various platforms as well as the web.



MerkleOne
[More Information](#)



Criteo
[More Information](#)



AdRoll CRM Retargeting
[More Information](#)



LiveRamp
[More Information](#)



MediaMath TerminalOne
[More Information](#)



KruX
[More Information](#)



Turn Audience Suite
[More Information](#)



Lotame
[More Information](#)



Marketo Ad Bridge
[More Information](#)



eXelate (a Nielsen Company)
[More Information](#)

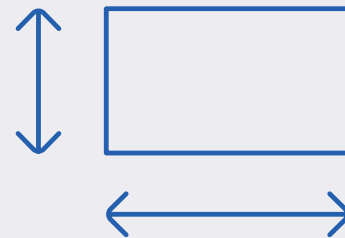
Knowing When CRM Retargeting Isn't Enough

While CRM retargeting is a powerful tool for marketers, it is not a silver bullet. There are some areas where marketers may feel limited:



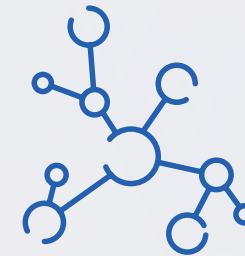
Automation

The process of implementing CRM retargeting is still a somewhat manual process of segmenting and pushing lists. While many marketing clouds are making this process easier, it still requires more time and effort than other **programmatic display** channels.



Scale

The scalability of a CRM retargeting campaign is dependent on two things: the size of a marketer's CRM database, and the size of a platform's audience. If either of these are too small, it results in low match rates and makes it difficult for campaigns to scale.



Data

Segments used in CRM retargeting campaigns are collected from past interactions with customers, and while effective for informing campaigns, it doesn't allow for real-time targeting based on current or future intent and needs.

But there is a solution that will solve for these limitations and increase our overall understanding of who these customers are and our ability to market to their intent.

Marketing to Intent

Marketing to intent refers to reaching your customer with specific messaging based upon their expressed interest, either explicitly or implicitly, to adopt, purchase or consume a particular product or service. Customers express intent through various behaviors like adding items to a shopping cart, reading articles, opening emails, liking a Facebook page, or in search queries.

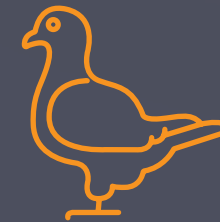
This is the next step in the evolution of leveraging your CRM data - not just marketing to what your customer has needed from you in the past, but what they need from you right now and what they will need from you in the future.

Marketing to intent, at scale, requires something a bit more powerful than what CRM retargeting alone can offer. It requires a new, comprehensive solution called the Identity Graph.

But that's a different handbook.

About LiveIntent

LiveIntent is a smarter way to market and advertise in email. The LiveIntent platform helps over 800 brands deliver marketing and advertising messages to over 120MM unique, engaged people each month, in emails sent by 1100 publishers and brands to their loyal subscribers. In 2010, LiveIntent cut its teeth as a smarter way to buy and sell ads in email and has since been recognized in both 2014 and 2015 as the second fastest growing company in NYC (by Crain's) and as one of America's Most Promising Companies (Forbes 2015.) With the email address at the center of its platform, LiveIntent has evolved beyond simply putting ads in email. LiveIntent is now one of the largest people-based marketing platforms in the world and also one of the first, having gone to market with the technology in 2010. LiveIntent is headquartered in NYC, with offices in Austin, Copenhagen, Detroit, Berlin, and the UK, serving as home to over 200 people and counting.



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Carrier Pigeon:

(must supply your own pigeon)

Glossary of Terms

Cookies:

Anonymous pieces of HTML code used for storing website visitor data, as well as aggregating and targeting online audiences. They are tied to specific devices and browsers.

Cookie-based Retargeting:

Using cookies to collect data on anonymous visitors to your website or someone else's, then using that data to segment and match those cookies with targeted messaging across various online media channels, typically advertising exchanges or networks.

CRM:

Customer relationship management (CRM) is a term that refers to practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers, assisting in customer retention and driving sales growth.

CRM Data:

Also known as "first-party data" or "customer data," this is information collected by marketers from their customers across different channels and points of contact, including websites, telephone, live chat, direct mail, email, display, search, marketing materials and social media. This can contain detailed information on customers' personal information, purchase history, buying preferences and concerns.

CRM Retargeting:

CRM retargeting is a way for you to securely use your deterministic CRM data (like email addresses or phone numbers) to match customer segments with targeted display messaging whenever these customers log-into certain online media channels like: Facebook, Twitter, YouTube, Google Search, Email.

Data Management Platform:

These are online software platforms that collect and store massive amounts of online and offline data that can be analyzed and segmented for marketers, publishers and other businesses.

Data Onboarding:

The process of transferring offline data to an online environment for marketing needs. Data onboarding is mainly used to connect offline customer records with online users by matching identifying information gathered from offline datasets to retrieve the same customers in an online audience.

Deterministic ID:

A piece of personally identifiable information that is unique to an individual and persistent across all devices, browsers, and platforms. Deterministic ID's include phone numbers, social logins and IDs, mobile app logins or IDs, and email addresses.

Hashing Algorithm:

Hashing Algorithms are programs that de-identify personally identifiable information used in CRM retargeting (like an email address) into an irreversible string of letters and numbers that is identical across all platforms. These are used to protect customer privacy and data. The most common hash types are MD5, Sha-1 and Sha-2.

Marketing Clouds:

Technology platforms that provide a web-based solution for managing customer data and delivering customers an integrated digital and real world experience, personalized for every individual, based on their needs, desires, preferences, activities, past behaviors and location.

Marketing to Intent:

This is the process of reaching your customer with specific messaging based upon their expressed interest, either explicitly or implicitly, to adopt, purchase or consume a particular product or service. Customers express intent through various behaviors like adding items to a shopping cart, reading articles, opening emails, liking a Facebook page, or in search queries.

Probabilistic Models:

Probabilistic models are algorithms that gather data from hundreds to thousands of different anonymous sources like cookies, IP address, device IDs, and mobile apps and browsers to track and infer customer identity across multiple devices. They have varied success rates anywhere from 60 to 90 percent accuracy.

Programmatic Display:

Display ads that are bought and sold by machines, typically through an automated auction managed through a supply-side platform.

Walled Garden:

Refers to platforms that do not allow for passing data back to marketers for use in third-party channels or attribution models.



Crediting Sources and Learning More

This is where we got all the great information we used to write this handbook, and a bunch of stuff that's great to read if you're interested in learning more.

1. Why Retargeting is the Hottest Area of Ad Tech
[Digiday](#)
 2. 2015 Email Marketing Metrics Benchmark Study
[Silverpop](#)
 3. Time Spent Online (January - June 2015)
[The IAB](#)
 4. Average number of connected devices used per person in selected countries in 2014
[Statista](#)
 5. Cisco Visual Networking Index
[Cisco](#)
 6. WTF is Cross-Device Tracking
[Digiday](#)
 7. Study Finds Shoppers Prefer Brick-And-Mortar Stores to Amazon and EBay
[Forbes](#)
 8. Navigating the New Digital Divide
[Deloitte Digital](#)
- CRM Retargeting: How It Works and Everything You Need to Know Before Using It
[The Huffington Post](#)
 - A Marketer's Guide To Cross-Device Identity
[AdExchanger](#)
 - CRM Retargeting? The Next Wave Of Big Data Utilization For Marketing
[Forbes](#)
 - Your Complete CRM Handbook
[Salesforce](#)
 - Probabilistic Identifiers and the Problem with ID Matching
[AdMonsters](#)
 - Data Segments and Techniques Lexicon
[IAB](#)

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