Automating Fan & Customer Segmentation

OVERVIEW

Time is one of the most valuable resources in the world, yet it's one we almost universally struggle to manage. Organizations of every shape, size, and industry constantly strive to "work smarter, not harder". At KORE Software, we specialize in helping teams spend their time where it matters most. Our cutting-edge technology accelerates organizations through automation, helping them spend more time on strategy instead of spreadsheets.

Professional Major League Soccer (MLS) club Nashville SC has a team of Business Intelligence experts committed to helping their fans enjoy the sport and team as much as possible. Having only joined MLS in 2020 as an expansion team, Nashville SC was looking to grow their existing fan base quickly and efficiently. During their first year, the team studied how they were spending time and where it could be put to better use. With help from KORE Planning & Insights (KPI), they installed a data pipeline to automate much of the drudgery and get better outcomes.

👍 LEADING THE MARKET
We help teams win, by providing the deepest and most connected ecosystem of solutions, data, and insights tailor fit to our customer's needs.

SITUATION

Companies often have one system that holds customer and partner contact information (i.e., a CRM) and another for marketing services. Nashville SC uses Salesforce Sales Cloud for their CRM and Salesforce Marketing Cloud (SFMC) for email marketing. Even when both systems are provided by the same vendor, it can be a challenge to get them interacting with each other—but the alternative is to let manual and repetitive tasks consume the bulk of the workday.

As Nashville SC rapidly expanded their fanbase upon joining MLS, their fan and customer data began adding up. But the team couldn't make efficient use of that data—buying habits, interactions, and even social media sentiment are nearly impossible to actively track without automation.

Mark Simmons, Senior Director of BI, and Lauren Smith, BI Analyst, recognized they had a problem. They were spending too much time manually creating one-off lists of customers and fans to fulfill requests from various departments. But it went further than just making lists—Mark and Lauren also spent too much time meeting with those other departments to understand their needs, formatting the data appropriately, and sending the files to the requestors.

The inefficiencies didn't affect only the BI team, though. For example, the Marketing team had to ask questions like "How long will it take to get the campaign lists we need? When will they be uploaded, and when can we send our emails? How can we get the data we need when someone's on vacation?" Worse still, the customer lists were single-use only—the same inefficient process had to be repeated for future campaigns.

APPROACH

How could Mark and Lauren make things more efficient, for both themselves and their colleagues? Salesforce provides the Marketing Cloud Connect tool to share data across the two services. Although not terribly difficult to install, it does require some technical expertise to configure the system for the best effectiveness.

Additionally, Nashville SC's Sales and Operations teams use KORE's Data Warehouse and Analytics (DWA) to collect data from ticketing, sponsorship, social media, and retail services. Unlocking that powerful data for the Marketing team would be a huge win. This led Mark and Lauren to ask KPI for advice.

KPI has experience customizing Salesforce Connectors for other clients, and experience how shown how fundamental it is to truly understand a client's objectives. So, they began by asking Nashville SC a few key questions:

1 How are we using data?

2 What are we doing most often that can be automated?

3 Where are our fans and how do we keep them engaged?

With the team's needs established, KPI set up Salesforce Connector to provide a constant, real-time flow of granular data between the team's two systems. Then, they built an extension to tie email records from Salesforce Marketing Cloud to specific contact IDs in the CRM. By mapping a contact to their records in both Salesforce services, it became possible to assign tags for each contact based on data in the KORE DWA Insights Portal.

Tags can help personalize messaging by bucketing contacts into different audiences. They are essentially saved database queries which are run nightly, producing lists of contacts who meet certain conditions. For example, the "season ticket member" tag might be assigned to customers who purchased a particular ticket package.

KORE DWA Data

salesforce marketing cloud

Automated Segmented Data Extensions
(ex. season ticket members, group buyers, etc.)
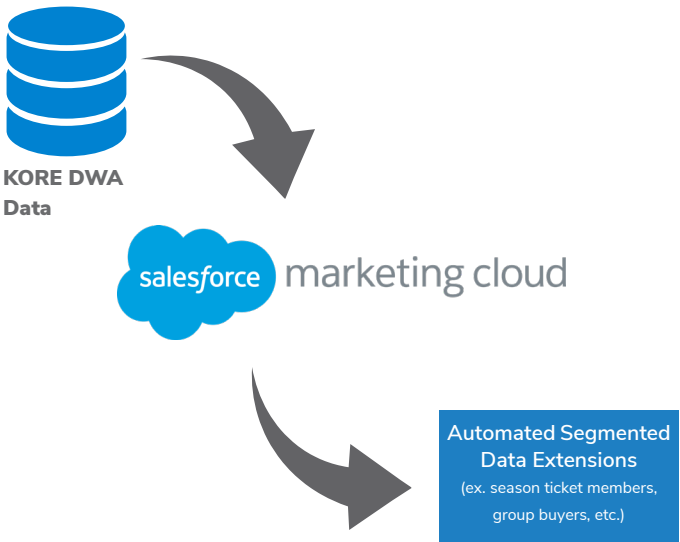
SOPHISTICATED SOFTWARE
Our platform empowers organizations to make smarter decisions, build stronger customer connections, and tell stories with impact.

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Old Method — New Method

Step 1
Identify group to target

Step 1
Establish criteria for tags

Step 2
Request a list-pull from BI

Step 2
Identify group to target

Step 3
BI creates a "tag" based on this new request

Step 3
Pull a list of contacts

Step 4
BI pulls list based on criteria

Step 4
Campaign distribution and follow up

Step 5
BI sends list to requestor

Step 6
List gets uploaded to the marketing cloud

Step 7
Campaign distrubution and follow up

With KORE's new method, we eliminate the unnecessary steps which leave room for human error.

Departments can choose a tag and the list automatically generates for the specified campaign.

RESULTS

Prior to connecting Nashville SC's systems, outbound messaging was an "all or nothing" proposition—a fan would either receive all the emails or none of them. But this isn't what most sports fans want: many love keeping up with their team and welcome their emails, but they don't want a lot of irrelevant messages either. Consider a family from out of town who attended a game while on vacation. Months later, they might still be receiving generic emails that don't interest them even though they like the team.

Naturally, Nashville SC didn't want to annoy and alienate their fans with too much irrelevant email. They therefore had a lengthy and deliberate process for communicating with fans (potential sales leads) in this manner. But this caused delayed delivery of team news and updates, and poorly timed promotions. By feeding tags from KORE DWA into Salesforce Marketing Cloud, it becomes possible to target different types of emails to the fans most likely to be receptive.

Take the "season ticket member" tag from before: a customer with that tag isn't likely to appreciate special offers for individual game tickets, but they may be enthusiastic about a meet-and-greet event with one of the players.

With this data now available in Salesforce Marketing Cloud, Nashville SC used tags to decide which of four major email categories each fan would be interested in:

- ✓ Matchday
- ✓ News
- ✓ Ticketing
- ✓ Stadium

The team created additional segments within these major groups. For example, "Matchday" emails could be targeted to either season ticket members or single game buyers. Of course, fans shouldn't be in the same segments forever—they can enter or exit these lists based on their activities. Thanks to KORE DWA's nightly tag updates and the customized data pipeline, each of Nashville SC's departments always have access to the most up-to-date customer lists. If a single game buyer upgrades to a season ticket member, they'll be in the proper marketing lists the very next day.

"Having automated reports of email engagement driven by custom fields delivered from Salesforce each morning has been crucial in reducing manual work for the BI team while also giving our Ticketing teams consistently fresh leads."

-Mark Simmons, Nashville SC Senior Director of Business Intelligence

Almost immediately, Mark and Lauren saw efficiency gains. But the automation also helped them discover something incredible: instead of being stuck with two "all or nothing" customer bases, the team now accesses ten (and counting!) audiences with unique characteristics. By understanding their fans more personally, the team can better serve them. For example, the family who attended a game while on vacation would receive catered emails about the team's performance—not an unwanted barrage of ticketing promotions they can't take advantage of.

Nashville SC's Marketing team is enjoying the improved efficiency, too. They can get the lists they need much faster, and the data remains safely and securely within Salesforce—no files to upload or spreadsheets to email around.

Tagging and creating new audience segments empowers the team to curate more personal and relevant messaging. For example, marketing campaigns can now target fans who historically buy tickets a week before an event with different messaging than same-day buyers. And since the Marketing department can schedule these activities in advance, they can spend more time curating their strategy instead of doing busy work.

Nashville SC's Premium Sales and Corporate Partnerships teams are taking advantage of the automation as well. Premium Sales is pursuing an automated fan journey, grouping customers (both individuals and businesses) into categories based on their purchase history to reveal their habits.

In Corporate Partnerships, they use Salesforce Marketing Cloud for away-team communications and corporate partner messaging. Different partnership agreements have unique entitlements, so these need to be monitored. Overall, Nashville SC's entire business receives a lift by leveraging centralized and categorized data sets, allowing the staff to focus more on strategy and decision making.

"With the full adoption of SFMC, we have gone from 0% list automation to ~85% list automation, making our marketing efforts more efficient and targeted."

-Mark Simmons, Nashville SC Senior Director of Business Intelligence

As more fans are identified in different markets, Nashville SC can leverage more advanced data analysis to curate their messaging, price their tickets and merchandise, and grow their brand.

This data extension isn't limited to just email marketing. Nashville SC also integrates another tool called Formstack where fans who submit online forms are immediately added to Salesforce Marketing Cloud and the appropriate audience buckets based on their responses. For example, if the team indicates that a form is related to a sweepstakes, fans who complete the form can be opted into announcements of future contests. Since these fans are easier to identify and group, lead management becomes significantly warmer for Ticketing, Marketing, and other departments.

"Different forms within Formstack help opt fans into those Marketing Cloud preferences, depending on the language and context within the form submitted.... The integration between Formstack and SFMC was seamless and the capabilities for customization of preferences based on specific lead capture forms has further helped segment our email communications."

-Lauren Smith, Nashville SC Business Intelligence Analyst

LOOKING AHEAD

Nashville SC's ongoing goal is to identify fans and cater to them on a more personal level, even as those fans change. With the adoption of this data flow, the club went from recognizing just two audience categories to ten, each with a different persona. The extension between Salesforce Marketing Cloud and CRM is making it simpler than ever before for new fans to receive relevant email marketing.

Creating these audience segments helps create much more optimized fan while also decreasing the day-to-day workloads of the BI, Marketing, and Partnerships departments. Nashville SC can now properly welcome their fans to a new, consistently catered relationship built with that fan in mind.