



WINTERBERRY  GROUP

From Theory to Practice:

A Roadmap to “Omnichannel” Activation

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FOREWORD Of all the marketing buzzwords that have emerged over the last two decades, perhaps no other has resonated as strongly as one: *omnichannel*.

A product of the 1990s digital revolution, the term first emerged in the world of retail, where marketers were uniquely challenged to integrate their customers' buying experience across what had been a fragmented and confusing array of brick-and-mortar, e-commerce and other direct-to-consumer touch points. "Align the customer experience," the theory posited, "and you'll build lasting loyalty."

Since those early days, the omnichannel mandate has moved steadily beyond its retail roots. It's evolved to encompass marketing as well as sales, and its practitioners have grown to embrace a robust mix of both traditional and emerging channels in their promotional mix. But at virtually every step of the way, the practical deployment of omnichannel programs has been stymied by a simple reality: while leveraging a wide range of marketing channels is easy, coordinating the deployment of those efforts so as to put the *customer* at the center of the engagement—with a continuous focus on delivering the right experience, at the right time, to the right individual—is difficult work.

In undertaking this research, we've aimed to advance an industry-wide conversation about the practical implications of "omnichannel" (and similarly transformative customer-centric marketing practices)—helping practitioners benchmark their efforts and leverage the experiences of their peers so as to drive real, positive change within their organizations. We look forward to your feedback.

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Additionally, we extend our deepest appreciation to the marketers, publishers, technology developers and service providers who contributed their time, insights and enthusiasm in support of our research. Though their individual names are not mentioned in this paper, they represent some of the most respected and innovative companies in the data-driven marketing and media world.

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**INTRODUCTION
AND EXECUTIVE
SUMMARY**

The practice of omnichannel is coming of age.

Driven in large part by the proliferation of customer data and the emergence of powerful new marketing technologies (and helped along by the learnings accrued over about 20 years of trial-and-error), savvy marketers are finally seeing results from their efforts to deploy truly integrated marketing strategies across audiences of scale and vast complexity. Critically, those successes are finally putting to rest old misconceptions about the relative value of disparate marketing channels and helping brands fulfill a long-held promise: that their customers would ultimately reside at the center of their marketing efforts.

This white paper, developed in partnership with DMA and through the sponsorship of Acxiom Corporation, Criteo and SG360, aims to shine a light on those practices so as to help marketers across all vertical industries apply a set of established best practices to the deployment of their own omnichannel programs. Based on an intensive research effort that included telephone and online surveys of more than 100 marketers and service providers, it will establish that successful omnichannel strategies are grounded in three universal ingredients:

Recognition: the persistent identification of individual audience members—including both customers and prospects—as they engage with various promotional and transactional touch points.

Engagement: the maintenance of a robust, fluid mix of customer-facing channels, to be deployed in such a way that delivers the best possible customer experience (while leveraging the inherent strengths of each channel)

Orchestration: the coordinated management of the promotional and transactional customer experience, leveraging a combination of data-driven insights and foundational infrastructure supporting optimal channel selection, messaging, cadence, personalization and fulfillment of all appropriate customer preferences.



72.4%

...of panelists have identified audience **recognition** as at least a moderate priority...



... but only **6.7%**

...are fully satisfied in their ability to leverage audience identifiers or attributes surfaced in one channel for recognition, targeting and **engagement** across other touch points.



37.5%

...of panelists feel they are able to **orchestrate** the delivery of content across all the media channels that they use today to some extent.

Among its key findings, it will also show:

<p>∨ TAKEAWAY</p>	<p>∨ SUPPORTING EVIDENCE</p>
<p>Persistent recognition of customers and prospects across a range of touch points represents the most fundamental element of true omnichannel marketing—and a business priority of rapidly growing importance.</p>	<ul style="list-style-type: none"> Nearly three-quarters (72.4 percent) of survey panelists indicated that their organizations are actively pursuing cross-channel audience recognition as a key business priority. Over two-thirds (68.7 percent) said their audience recognition efforts have supported their ability to drive value from new and/or previously underleveraged media channels.
<p>Despite their efforts, most marketers struggle to recognize their customer audiences consistently, inhibiting their ability to develop and execute upon cross-channel insights.</p>	<ul style="list-style-type: none"> Only 8.9 percent of panelists said they consistently recognize customer audience members across all of the media channels at their disposal. Along the same lines, just 6.7 percent said they're fully satisfied with their ability to leverage audience identifiers and/or attributes surfaced in one channel (i.e. terrestrial contact information, IP address, behavioral data, etc.) for recognition, targeting and engagement across <i>all other</i> touch points. Still, marketers are clearly making do as they focus on accelerating their recognition efforts. A solid majority of panelists (77.8 percent) said they're regularly able to identify individual audience members across at least "some" of their addressable marketing channels.
<p>More than anything else, marketers believe the key to better audience recognition is better integration of their marketing technology and addressable data assets.</p>	<ul style="list-style-type: none"> Panelists noted that their audience recognition efforts would be most advanced by better aggregation and management of data (selected by 47.7 percent), deeper integration of their marketing technologies (39.5 percent) and introduction of systems or processes to match audience profiles across channels (38.4 percent).
<p>Casting aside old misconceptions about the value of digital and traditional media, marketers increasingly recognize that all channels play a potentially critical role in the omnichannel mix—provided they're deployed to support the use cases for which they're most appropriate.</p>	<ul style="list-style-type: none"> When it comes to brand building, more panelists (90.9 percent) endorsed the positive impact of broadcast advertising than any other channel; online display advertising and online social display advertising were cited next. Asked about the acquisition of specific, uniquely qualified customers, most panelists (54.5 percent) were bullish about the role of direct mail, followed by search. And with respect to the acquisition of "in-market" customers (those actively seeking out a product or service), more panelists (77.1 percent) chose search than any other channel, followed by online display advertising.

✧ TAKEAWAY

✧ SUPPORTING EVIDENCE

The email channel has matured to assume a critical role as a “bridge” between various omnichannel initiatives—supporting both customer recognition and engagement, as well as a series of advertising and marketing use cases that are driven by traditional and digital datasets.

- In addition to playing a critical role in supporting retention-oriented marketing—more panelists (51.3 percent) endorsed its importance as a driver of **up-sell and cross-sell of existing customers** than any other channels—email was cited as the channel best suited to drive value in conjunction with other media, as selected by 58 percent of panelists.

Though marketers are extremely bullish on the potential contributions of mobile across a range of use cases, the channel has yet to solidify its contribution or impact across any specific set of applications.

- Though panelists expressed anecdotal enthusiasm about the role that mobile apps and mobile advertising would ultimately play in their omnichannel mix, they likewise said that the channel doesn’t yet represent a “first choice” option to support any of their various strategic use cases.
- Nevertheless, significant numbers of panelists endorsed the mobile channel as a driver of **customer service/support** (endorsed by 48.6 percent) and **up-sell/cross-sell of existing customers** (32.4 percent).

Where marketers are succeeding in the deployment of complex omnichannel strategies, they’re doing so thanks largely to the contributions of the supply chain partners—including agencies, data providers and other third parties that support the execution of those underlying programs.

- Most panelists said they’re generally confident in their basic ability to orchestrate the delivery of messages across multiple channels; 40 percent of panelists said they’re able to orchestrate the cross-channel delivery of marketing content fairly or extremely well, and a further 37.5 percent said they’re able to do so at least “to some extent”.
- What’s responsible for powering that success? More than any other factor, panelists endorsed the role of their supply chain partners, whose contributions, they said, are delivering even greater value than the licensed technology platforms (and even internal business processes) whose work they complement.

What’s the next frontier of omnichannel marketing? Panelists said the next great leap forward would be driven *from the inside*, with the potential alignment of internal business processes and technology infrastructure likely to do more to advance their omnichannel efforts in the years ahead than any other initiative.

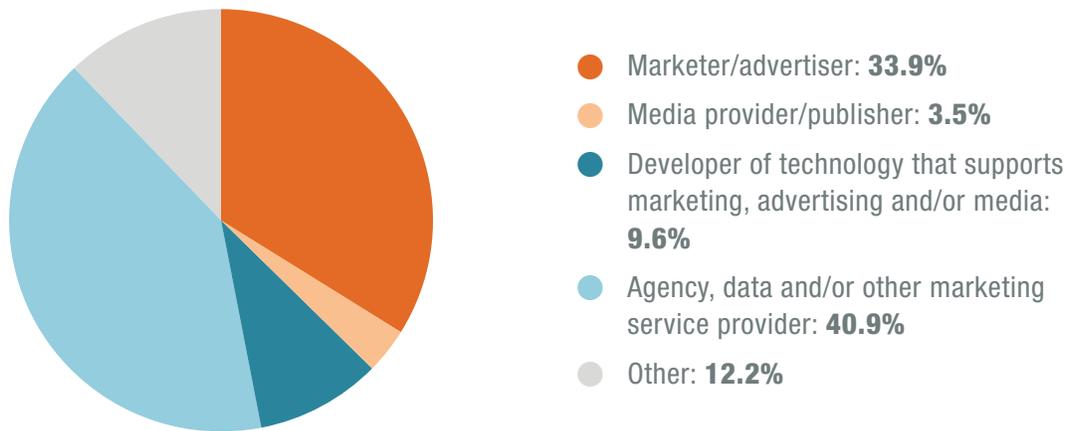
- Nearly half of panelists (49.3 percent) felt that better integration of their existing marketing technology would most advance their omnichannel marketing efforts; 40.3 percent selected better recognition capabilities for matching consumers across channels, while 37.3 called out better internal data management processes.

**RESEARCH
METHODOLOGY**

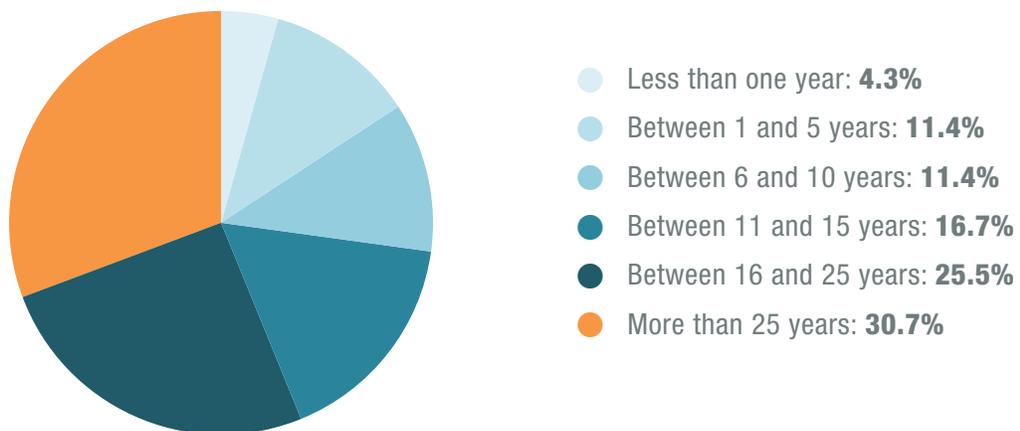
This white paper explores how marketers are leveraging a mix of data-driven insights, media channels and technology to fuel omnichannel customer engagement strategies.

Published in partnership with DMA and presented by Acxiom, Criteo and SG360, the paper’s findings are based on the results of an intensive research effort that included phone, online and in-person surveys of more than 100 advertisers, marketers, publishers, technology developers and marketing service providers (primarily based in North America, and conducted between August and September 2016).

How would you describe your principal role/business focus?



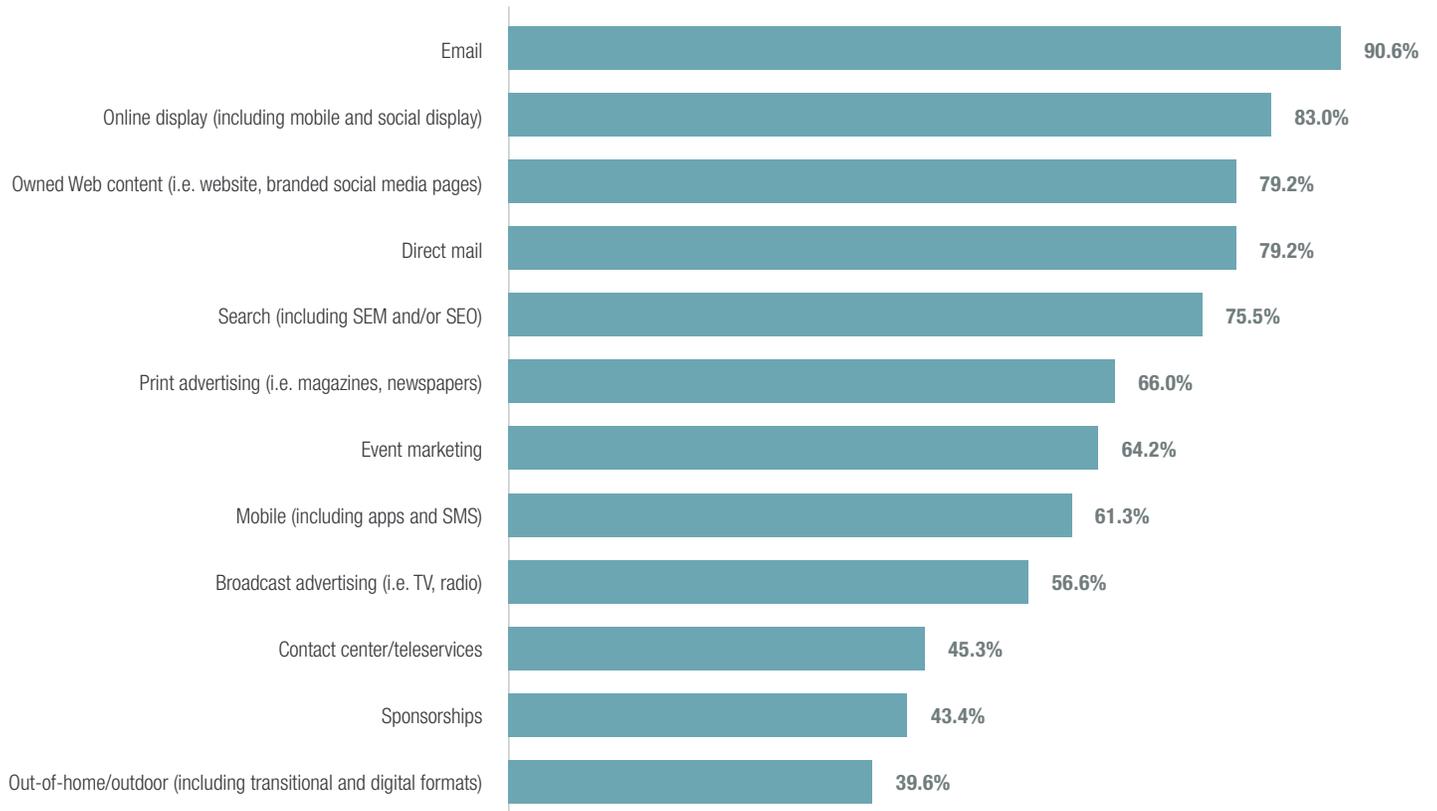
How many years of experience do you have working in advertising, marketing and/or media?



N=120

Note: Includes panelists who either completed a detailed online survey or participated in a structured telephone interview; panelists were not required to answer every question.

Which of the following media channels does your organization use to engage with customers and/or prospects in support of its marketing strategy? Please select all that apply.



RECOGNITION: THE FOUNDATION OF ACTIONABLE INSIGHTS Persistent recognition of customers and prospects across a range of touch points represents the most fundamental element of true omnichannel marketing—and a business priority of rapidly growing importance.

PANELISTS SAID...

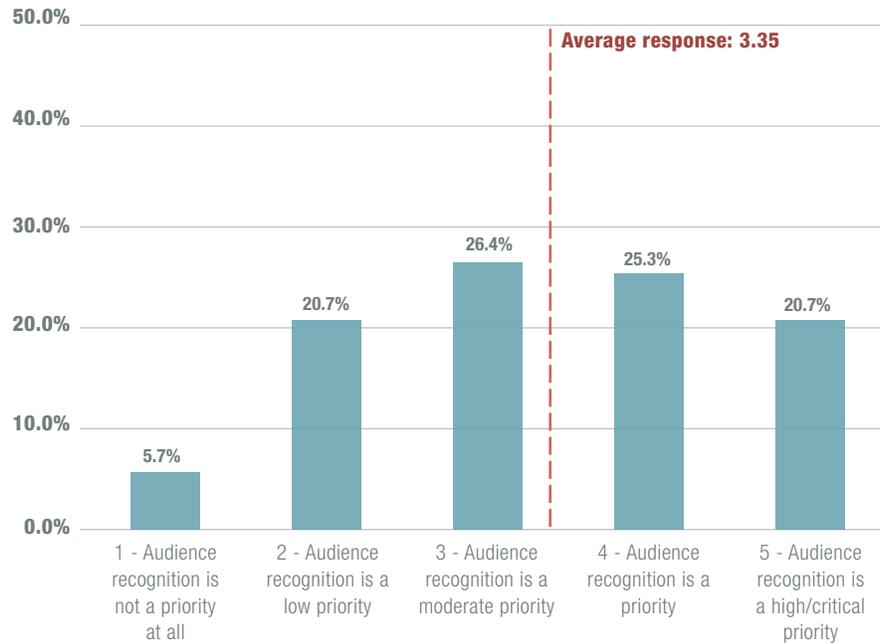
- ▶ In significant numbers, marketers are focusing on recognition as a critical first step to personalizing brand interactions across media channels. Nearly three-quarters (72.4 percent) of survey panelists, in fact, indicated that their organizations are actively pursuing cross-channel audience recognition as a key business priority.
- ▶ Much of that effort, it appears, is focused on unlocking *potential* value that previous omnichannel efforts have yet to deliver. On a scale of 1-to-5 (where 5 indicates that audience recognition is a “high priority” for their organization), panelists pegged their organizations’ level of interest at 3.35. By contrast, the same panelists assigned a slightly lower score—3.21—when asked to consider the extent to which previous and existing recognition efforts have supported their effort to derive value from new or underleveraged media.
- ▶ Nevertheless, that response suggests that when they are able to recognize audience members across touch points, marketers are able to derive affirmatively greater value from new and/or underleveraged channels—particularly through the empowerment of relevant, personalized communications. Over two-thirds of panelists (68.7 percent), for example, said their audience recognition efforts have supported the development of such value.



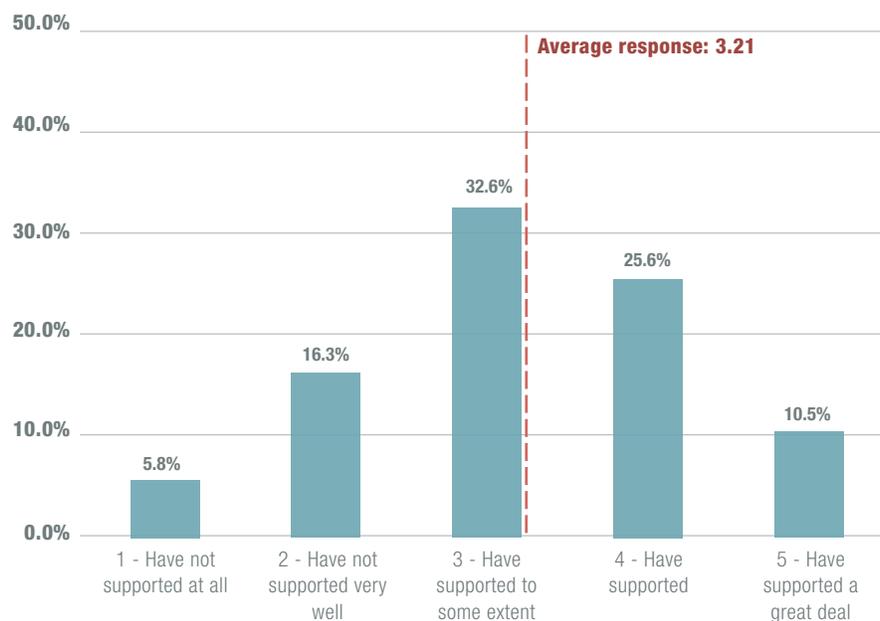
72.4%

...of panelists have identified audience recognition as at least a moderate priority...

To what extent has your organization identified audience recognition as a functional priority/focus area?



To what extent have your audience recognition efforts supported your ability to derive value from new and/or underleveraged media channels?



Despite their efforts, most marketers struggle to recognize their customer audiences consistently, inhibiting their ability to develop and execute upon cross-channel insights.

PANELISTS SAID...

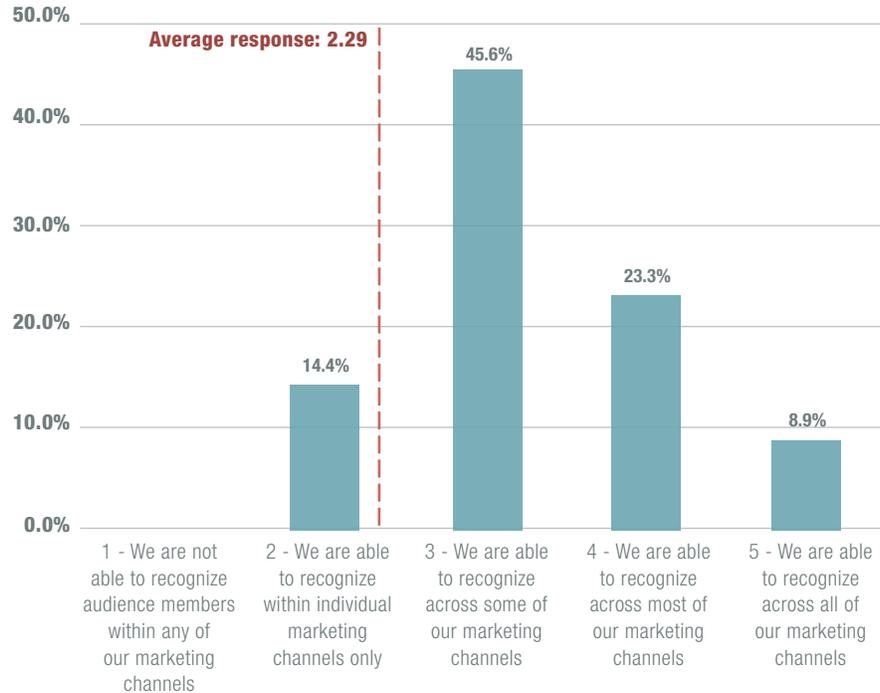
- ▶ Though marketers are increasingly prioritizing cross-channel audience identification, consistent recognition remains one of their biggest challenges. Even when marketers are able to collect identifying data through one channel, for example, they're commonly unable to leverage those identifiers to inform how they engage or target the same audience members across other touch points. Only 8.9 percent of panelists, for example, said they consistently recognize customer audience members across *all* of the media channels at their disposal.
 - ▶ Along the same lines, just 6.7 percent of panelists said they're "fully satisfied" with their ability to leverage audience identifiers and/or attributes surfaced in one channel (e.g. terrestrial contact information, IP address, behavioral data, etc.) for recognition, targeting and engagement across all other touch points.
 - ▶ Still, marketers are clearly making do as they focus on accelerating their recognition efforts. A solid majority of panelists (77.8 percent) said they're regularly able to identify individual audience members across at least "some" of their addressable marketing channels. And a slimmer majority (53.4 percent) are at least satisfied "to some extent" with their ability to leverage single-channel data for recognition of their customer audiences across other touch points.
-



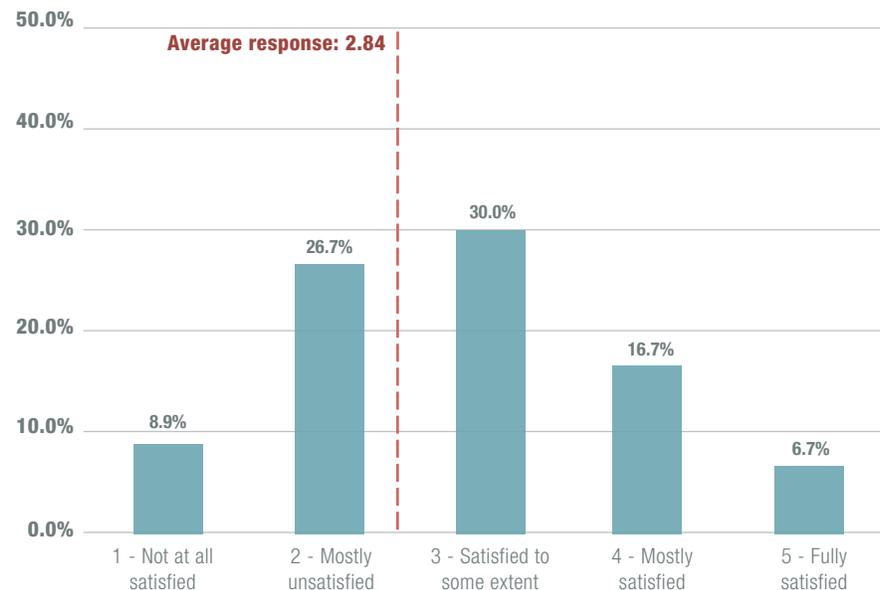
77.8%

...of panelists said they're regularly able to identify individual audience members across at least "some" of their addressable marketing channels.

How well is your organization able to recognize its target audience members across various marketing touch points/channels?



How satisfied are you with your ability to leverage audience identifiers/attributes surfaced through one channel for targeting and engagement of the same audiences across other channels?

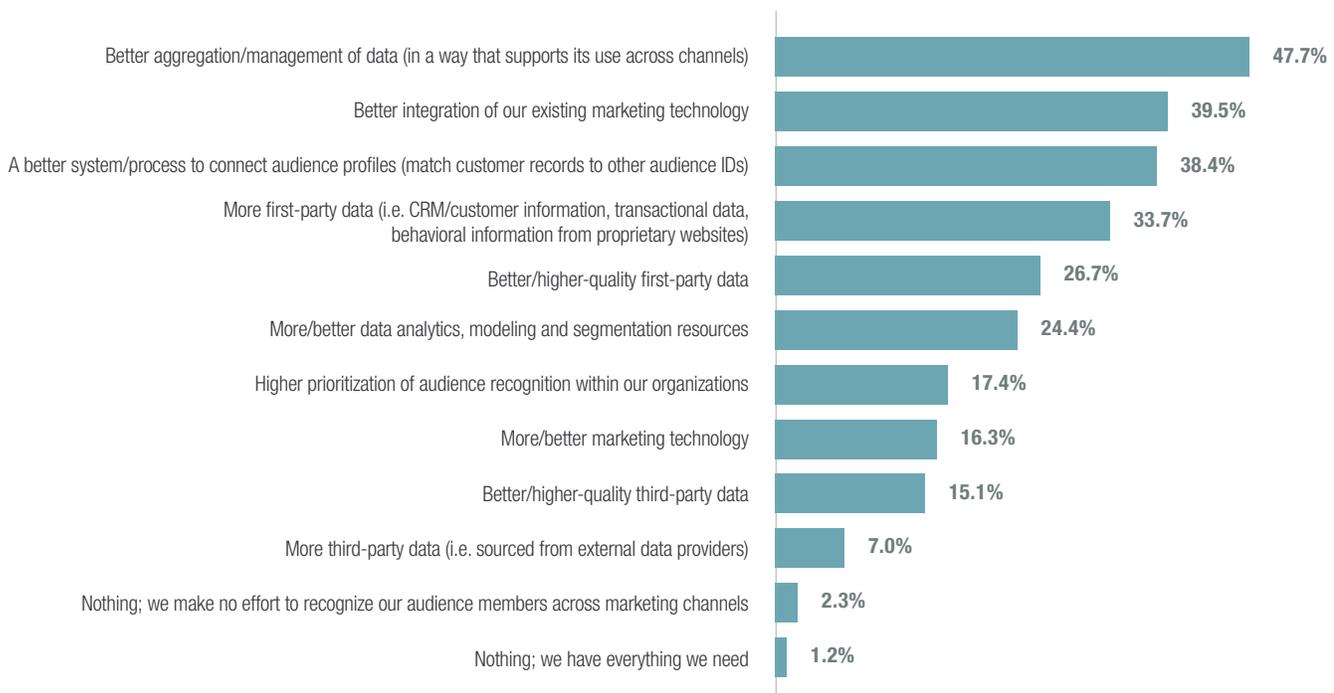


More than anything else, marketers believe the key to better audience recognition is better integration of their marketing technology and addressable data assets.

PANELISTS SAID...

- ▶ Panelists noted that their audience recognition efforts would be most significantly advanced through investment in a range of internal infrastructure and process improvements, most prominently including better aggregation and management of data (selected by 47.7 percent of panelists), deeper integration of their marketing technologies (39.5 percent) and introduction of systems or processes to match audience profiles across channels (38.4 percent).
- ▶ Only 1.2 percent of panelists, by contrast, indicated they have “everything [they] need” to support cross-channel audience recognition.

Which of the following would most advance your organization’s efforts to better recognize its addressable audiences across various marketing and media touch points?



*respondents chose between one and three answer choices

RECOGNITION ... IN THEIR OWN WORDS

- “Most companies are thinking a lot about audience recognition—it’s being accelerated by all the social media platforms out there that are announcing they can do CRM data retargeting. There’s a move in the U.S. towards thinking about how you use data, how you partner or build that internally, and there’s a business opportunity for supply chain partners in that recognition ability.”
- “Plenty of marketers know what they are doing with respect to recognition isn’t very good, but they persist with it because it’s working fine for the present and too hard to change—or they don’t have the resources and expertise.”
- “One thing we see often is customers wrestling with legacy systems and relationships—internally and with the providers that host the platforms that are the foundation of their customer marketing. If there’s one conclusion I’ve reached, it’s that ultimately there isn’t a silver bullet that provides a solution for effective recognition.”
- “One thing you find is that newer companies tend to be more successful at adapting to omnichannel because they find it easier to change quickly, by their nature. Twenty years ago, bigger companies were more sophisticated than smaller ones. Now that’s not the case—it’s easier to adapt if you’ve just joined the market because you don’t have to change entrenched culture and organizational structure, you can build up your organization with omnichannel in mind.”

“If there’s one conclusion I’ve reached, it’s that ultimately there isn’t a silver bullet that provides a solution for effective recognition.”

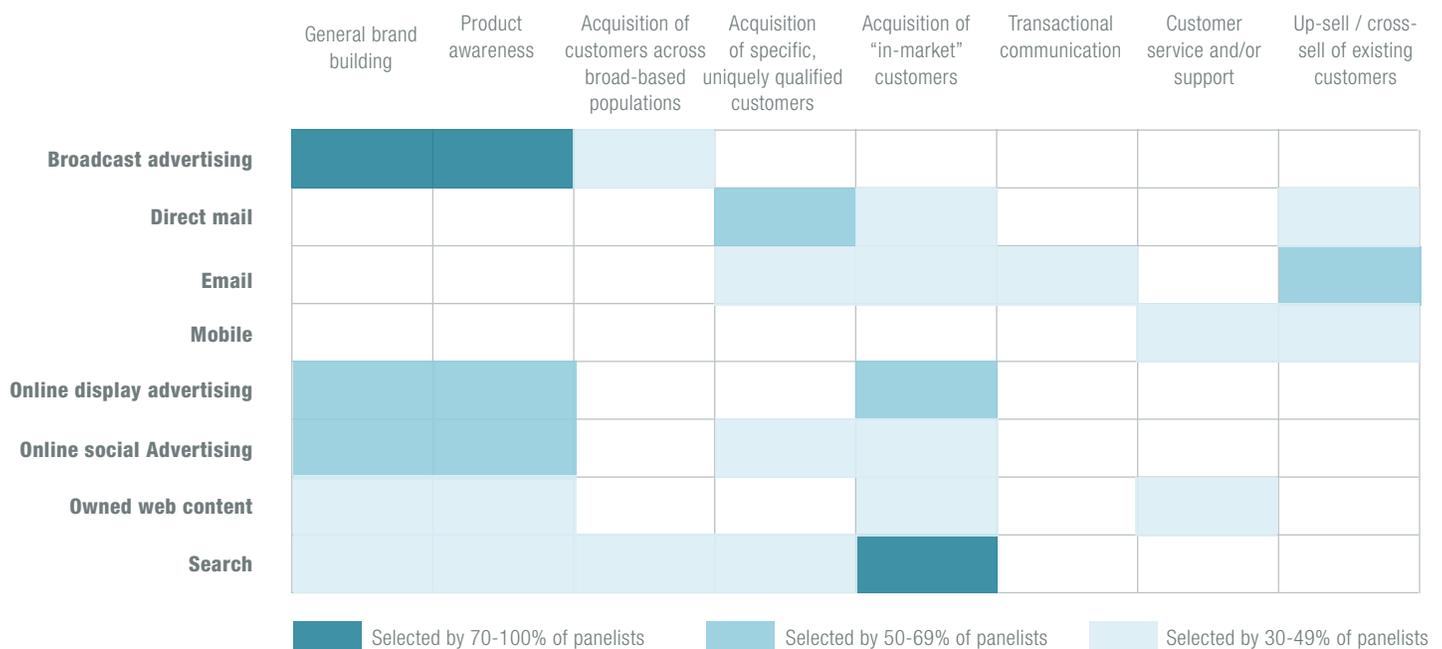
ENGAGEMENT: SUPPORTING A CROSS-CHANNEL CUSTOMER DIALOGUE Casting aside old misconceptions about the value of digital and traditional media, marketers increasingly recognize that all channels play a potentially critical role in the omnichannel mix—provided they’re deployed to support the use cases for which they’re most appropriate.

PANELISTS SAID...

- ▶ Marketers are increasingly looking beyond traditional distinctions between media channels that are “growing” or “in decline” to seek out a media mix that includes a robust but balanced mix of customer-facing touch points. The key driver of evolution: a growing understanding that different channels support fundamentally different marketing use cases—and that managing the alignment of those applications with their addressable media represents one of the fundamental missions of the omnichannel marketer. In particular:
 - When it comes to brand building, more panelists (90.9 percent) endorsed the role and positive impact of broadcast advertising than any other channel; online display advertising and online social display advertising were cited next.
 - Asked about acquisition of specific, uniquely qualified customers, most panelists (54.5 percent) were bullish about the role of direct mail, followed by search.
 - And with respect to the acquisition of “in-market” customers (those actively seeking out a product or service), more panelists (77.1 percent) chose search than any other channel, followed by online display advertising.

Mapping the Use Cases: A Channel-by-Channel Viewpoint

Which of the following use cases is each channel well suited to support?

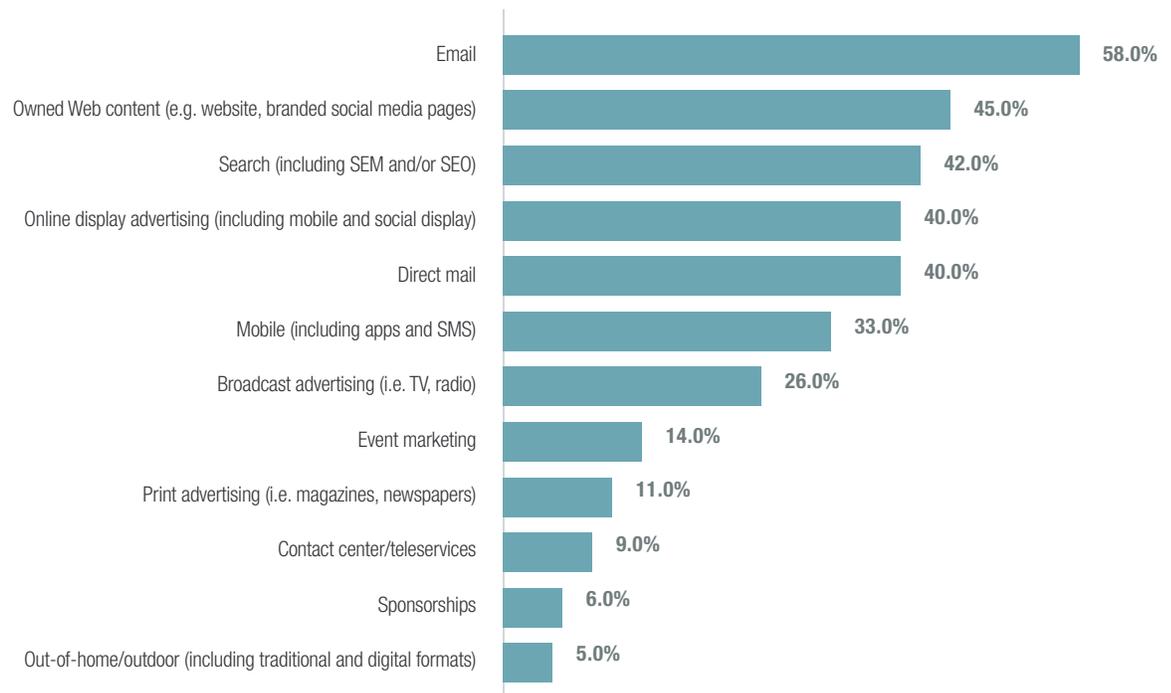


The email channel has matured to assume a critical role as a “bridge” between various omnichannel initiatives—supporting both customer recognition and engagement, as well as a series of advertising and marketing use cases that are driven by traditional and digital datasets.

PANELISTS SAID...

- ▶ In addition to playing a critical role in supporting retention-oriented marketing—more panelists (51.3 percent) endorsed its importance as a driver of **up-sell and cross-sell of existing customers** than any other channels—email was cited as the channel best suited to drive value in conjunction with other media, as selected by 58 percent of panelists.
- ▶ The versatile nature of email and its addressable dataset (which can be useful for cross-channel audience recognition through “matching” protocols that anonymize information for use in targeting and personalization of digital content) have positioned the channel at the crossroads of a number of key omnichannel demand trends. Panelist interviewees, for example, noted the channel’s unique efficacy as a direct *complement* to both targeted marketing and general advertising deployed through other channels.

Of the following media channels, which do you think are best suited to drive value in concert with the deployment of other media channels?



58%

...of panelists cited email as the channel best suited to drive value in concert with the deployment of other channels.

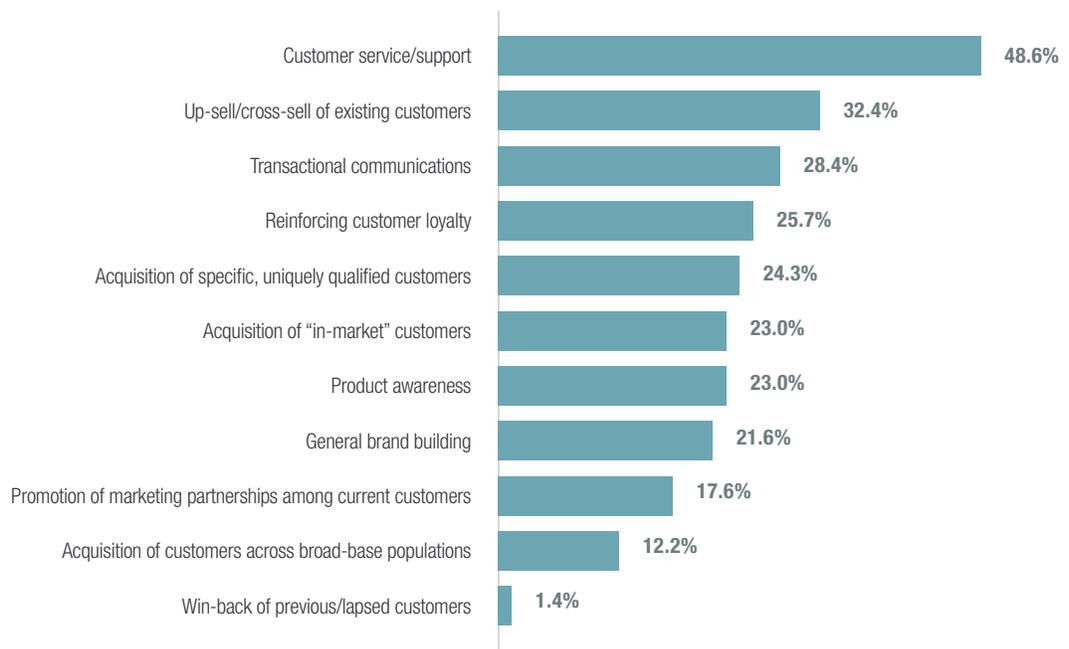
*respondents chose between one and three answer choices

Though marketers are extremely bullish on the potential contributions of mobile across a range of use cases, the channel has yet to solidify its contribution or impact with respect to any specific set of applications.

PANELISTS SAID...

- ▶ Though panelists expressed anecdotal enthusiasm about the role that mobile apps and mobile advertising would ultimately play in their omnichannel mix, they likewise said that the channel doesn't yet represent a "first choice" option to support *any* of their various strategic use cases.
- ▶ Nevertheless, significant numbers of panelists endorsed the mobile channel as a driver of **customer service/support** (endorsed by 48.6 percent) and **up-sell/cross-sell of existing customers** (32.4 percent), reinforcing the notion that mobile's most significant long-term role may be linked to its unique potential as a platform for *both* promotional marketing and the delivery and optimization of real-time customer experiences.

Please select the top three marketing use cases that you believe mobile is best suited to support.



*respondents chose between one and three answer choices



48.6%

...of panelists endorsed mobile as the channel best suited to customer service/support use cases.

ENGAGEMENT ... IN THEIR OWN WORDS

- “We are finding that channels complement each other and have complementary functions. We approach things for our clients from a neutral standpoint, as far as media or channel, and figure out best way to address their objectives.”
- “What used to be a channel-siloed approach to marketing has now become cross-channel. We use complex attribution models in order to look at the results of our marketing efforts in a channel-agnostic way, and we look at spend from a cross-channel perspective when we are thinking about marketing budget.”
- “In order to understand how best to leverage all of the channels at your disposal, you need to do customer research. That’s how you find the right balance of frequency and volume between all of your channels.”
- “It’s about integrating your marketing channels. I would advise organizations to bring email and direct mail together in their campaign deployment. And the next step would be to figure out how mobile comes into play to augment that.”
- “Email is very effective for marketing to existing customers, but I never see email work on its own. We have messed that up for ourselves as marketers by bombarding people with emails. I see response rates getting worse. But performance for email as a channel goes up when it’s a combined campaign with direct mail.”
- “What direct mail does well is to get people to read your message. It’s physical—you can’t delete it or ignore it like an email. People will either accept or reject your message, but they will look at it. I think direct mail works well for acquisition.”

“We are finding that channels complement each other and have complementary functions.”

ORCHESTRATION: COORDINATING THE CUSTOMER EXPERIENCE FOR MAXIMUM IMPACT Where marketers are succeeding in the deployment of complex omnichannel strategies, they're doing so thanks largely to the contributions of the supply chain partners—including agencies, data providers and other third parties that support the execution of those underlying programs.

PANELISTS SAID...

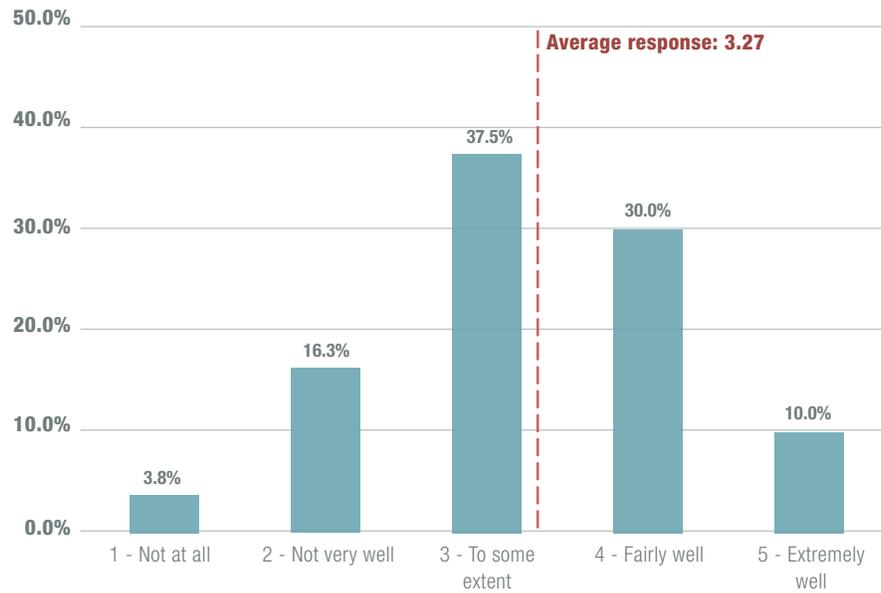
- ▶ While marketers may struggle today with audience recognition and the development of cross-channel insights, they are doing fairly well when it comes to deploying content and messaging across touch points in service of their broader omnichannel initiatives. In fact, most panelists said they're generally confident in their basic ability to orchestrate the delivery of messages across multiple channels. 40 percent of panelists said they're able to orchestrate the cross-channel delivery of marketing content fairly or extremely well, and a further 37.5 percent said they're able to do so at least "to some extent."
- ▶ What's responsible for powering that success? More than any other factor, panelists endorsed the contributions of their supply chain partners, whose contributions, they said, are delivering greater value than even the dedicated technology platforms (and even the *internal* business processes) whose work they complement.



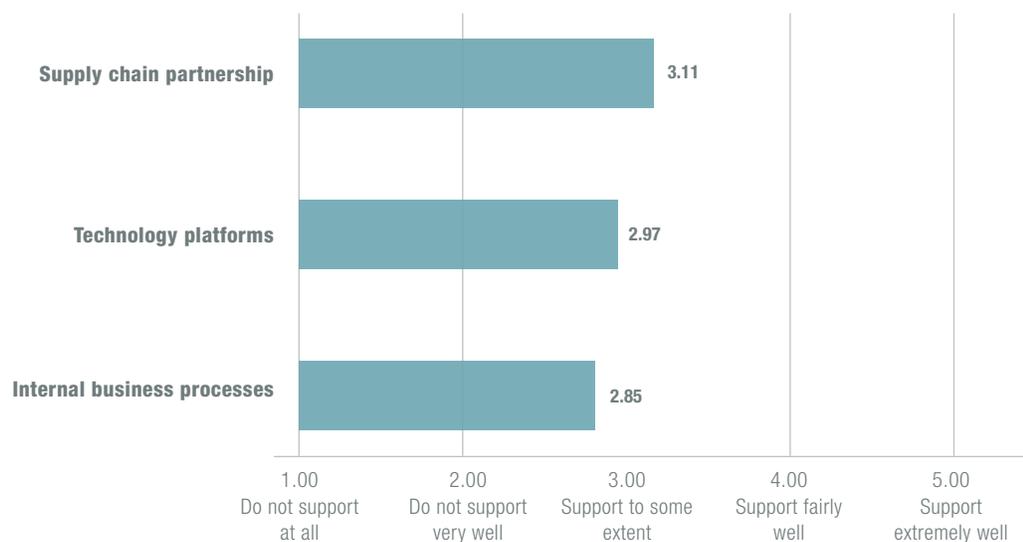
40%

...of panelists feel they are able to orchestrate the delivery of content across all the media channels that they use today fairly or extremely well.

To what extent do you feel your organization is able to orchestrate the delivery of content across all the media channels that it uses today?



How well would you say each of the following is supporting your ability to execute omnichannel strategies?



What's the next frontier of omnichannel marketing? Panelists said the next great leap forward would be driven from the inside, with the potential alignment of internal business processes and technology infrastructure likely to do more to advance their omnichannel efforts in the years ahead than any other initiative.

PANELISTS SAID...

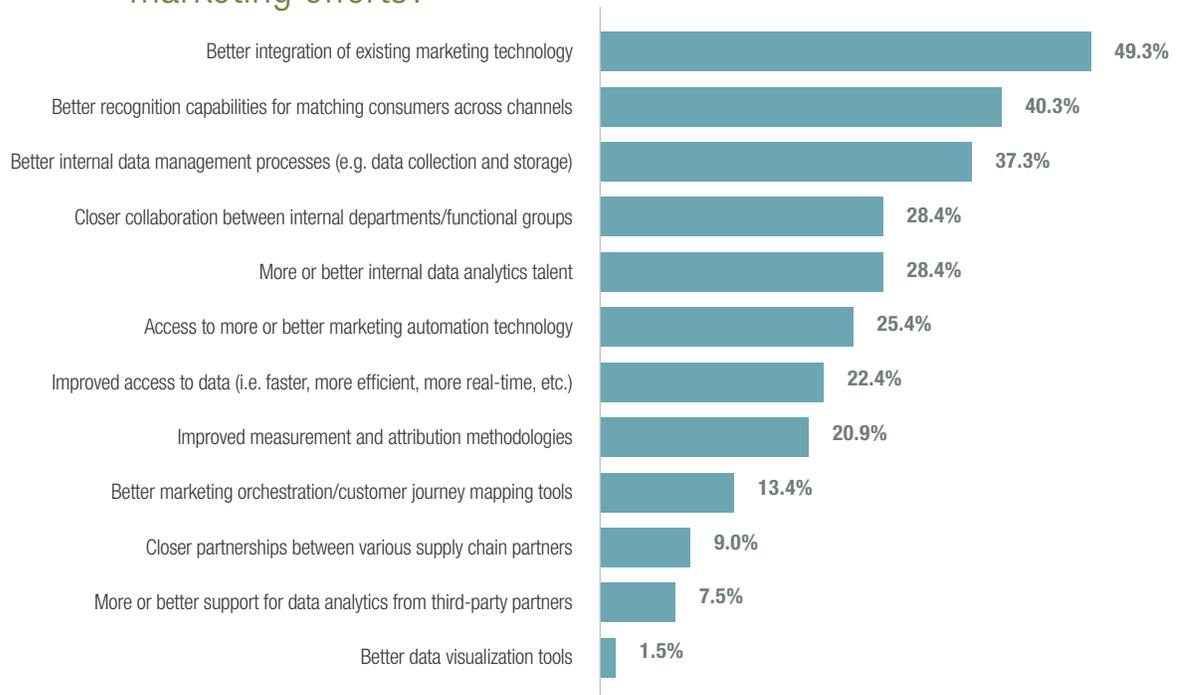
- ▶ Nearly half of panelists (49.3 percent) felt that “better integration of their existing marketing technology” would most advance their omnichannel marketing efforts in the years ahead.
 - ▶ Also likely to play a supporting role in the development of scalable omnichannel infrastructure: 40.3 percent selected “better recognition capabilities for matching consumers across channels” (selected by 40.3 percent of panelists) along with “better internal data management processes” (37.3 percent).
 - ▶ Anecdotally, a significant number of interviewed panelists echoed the importance of *internal* alignment as a key step in their organizations’ broader strategic evolution—with the theme of “customer-centricity” going hand-in-hand with a movement away from an emphasis on products, channels or legacy lines-of-business. Many noted that the “omnichannel infrastructure” investments their organizations are currently pursuing (often focused on better management of data or centralization of technology assets) can be used for positive *cultural* ends, as well—helping to catalyze an organization around a set of customer-oriented business objectives that support the general elevation of the marketing department and its role in the enterprise.
-



49.3%

...of panelists said that better integration of their existing marketing technology would do the most to advance their organization’s omnichannel marketing efforts.

Thinking about your organization’s infrastructure needs, which of the following would do most to advance your organization’s omnichannel marketing efforts?



*respondents chose between one and three answer choices

ORCHESTRATION ... IN THEIR OWN WORDS

- “Organizational structure is becoming more and more important to a successful marketing practice, especially when you’re trying to do omnichannel. The silos around channels, the channel-centric view has to go away, and that will be a challenge.”
- “We are in the process of migrating to one centralized database that will integrate all of our customer data, including offer and interaction history, and give us a 360-degree view of our customers. When omnichannel really comes to fruition is when you can see every interaction a customer has had across all channels and have that inform your future orchestration of content and offers.”
- “The impetus for us to take some action and integrate all of these legacy systems came from our C-suite. They gave us funding and then stepped back and let each department pick the platform that best suited our needs. Getting all of those platforms to talk to each other is a challenge, but we wanted to go best-in-breed for each piece and then put in the work and the time to integrate them.”
- “Often we engage with a client who wants us to optimize within one channel, and we try to tell them that where you reap the real benefit is by looking at everything in one unified view. The hardest part of being on the agency side is that you see where you could add value, but because of the way organizations are set up today, you can’t help them optimize across channels.”

“When omnichannel really comes to fruition is when you can see every interaction a customer has had across all channels and have that inform your future orchestration of content and offers.”

IN CONCLUSION The path to true “omnichannel” engagement is one that has no distinct destination. New media channels are likely to continue emerging at breakneck pace. Customers, including both consumers and B2B audiences, are growing more fragmented in their interests, attitudes and buying behaviors. And the datasets and technologies used to bridge the gap between the two—uniting channel and customer in what should be a productive long-term relationship—are only going to grow more complex over the years ahead, complicating the marketer’s work in as-yet unimaginable ways.

Fortunately, there’s a silver lining to this cloud of looming challenges: many marketers are already making great progress in driving a customer-centric business transformation. But few organizations have actually made the effort to develop comprehensive strategies—considering the three imperatives that are recognition, engagement and orchestration—to support the growth of their omnichannel effort over the long term. For many, that roadmap begins with a series of questions:

Recognition

- ▶ Does the organization have appropriate processes and protocols in place to share information across departments and functions?
- ▶ Does the organization have a process or solution in place to support persistent customer recognition—linking and understanding customer profiles across channels, brands and environments?
- ▶ How well is the organization’s data governance function—which should provide for central administration of all addressable data, ensuring that key information assets are safeguarded so as to protect the interests of *both* customer and company—geared to support various *types* of information, and new approaches to leveraging that data for cross-channel recognition?

Engagement

- ▶ Has the organization established a set of guiding principles to identify and prioritize key marketing use cases, aligning each with the most appropriate customer-facing channels?
- ▶ Is the organization agile enough to honor customers’ channel preferences consistently? Can it manage a diverse array of touch points so as to ensure the right channel is being deployed to the right customers at the right times?
- ▶ Are budgets allocated in such a way that enables the flexibility to rapidly shift resources from one channel and/or campaign to another based on customer response and performance?

Orchestration

- ▶ Is the organization able to surface insights about its customers and prospects in a way that informs meaningful interactions across all touch points?
- ▶ Are the organization’s technology platforms—overseeing data management, analytics, campaign management, message deployment and other functions—aligned so that data and other assets flow seamlessly from one tool to another?
- ▶ Do the organization’s internal business processes support the sharing of resources across the enterprise and the optimization of all addressable technologies? (Or do they act as a series of “workarounds” to compensate for gaps in resources and other issues?)
- ▶ To what extent do the organization’s supply chain partners support its efforts to drive lasting, channel-agnostic customer engagement?

WINTERBERRY GROUP

WINTERBERRY GROUP is a unique management consultancy that supports the growth of advertising, marketing, media, information and technology organizations—helping clients create custom strategies, capitalize on emerging opportunities and grow their value.

Our services include:

CORPORATE STRATEGY: The *Opportunity Mapping* strategic development process is geared to support agencies, marketing service providers, technology developers and other firms in their efforts to prioritize addressable pathways to growth and sort through complicated “buy-versus-build” decisions—as informed by a synthesis of market insights and intensive internal analysis.

MARKET INTELLIGENCE: Our comprehensive research on industry trends, vertical markets and evolving value chains provides in-depth analysis of key demand drivers, market developments and potential opportunities.

MARKETING AND DATA TRANSFORMATION: Our process mapping, marketplace benchmarking, holistic system engineering, use case analysis and vendor selection/RFP management offerings are grounded in deep industry insights and “real-world” understandings—with a focus on helping marketers and media companies better leverage their core assets and respond to growing demands for transformation driven by the emergence of data, digital media and marketing technology.

TRANSACTIONAL DILIGENCE: Both financial and strategic investors turn to us to provide strategic and operational diligence in support of their potential acquisitions in the advertising, marketing and media industries; our target assessment and industry landscape research provide insight into trends, forecasts and comparative transaction data needed for reliable financial model inputs, laying the right foundation for value-focused ownership.

Additionally, Winterberry Group is differentiated through its affiliation with **Petsky Prunier LLC**, the leading investment bank serving the technology, media, marketing, e-commerce and healthcare industries. Together, the two firms provide one of the largest and most experienced sources of strategic and transactional services in their addressable markets.

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Founded in 1917, **DMA** is the community that champions deeper consumer engagement and business value through the innovative and responsible use of data-driven marketing. DMA's membership is made up of today's leading tech and data innovators, brand marketers, agencies, service providers and media companies. By representing the entire marketing ecosystem – from demand side to supply side – DMA is uniquely positioned to bring win/win solutions to the market and ensure that innovative and disruptive marketing technology and techniques can be quickly applied for ROI.

DMA advances the data-driven marketing industry and serves its members through four principal pillars of leadership: advocating for marketers' ability to responsibly gather and refine detailed data; innovating to bring solutions forward for marketers' most vexing challenges; educating today's marketers to grow and lead marketing organizations in the ever-increasing omnichannel world; and connecting industry participants to stay current, learn best practices and gain access to emerging solutions through &THEN – the largest global event for data-driven marketing – and DMA's portfolio of other live events.

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Acxiom provides the data foundation for the world's best marketers. We enable people-based marketing everywhere through a simple, open approach to connecting systems and data that drives better customer experiences and higher ROI. A leader in the ethical use of data for more than 45 years, Acxiom serves thousands of clients and partners around the globe and seeks to power a world where all marketing is relevant.

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Criteo delivers personalized performance marketing at an extensive scale. Measuring return on post-click sales, Criteo makes ROI transparent and easy to measure. Criteo has over 2,000 employees in 31 offices across the Americas, EMEA and Asia-Pacific, serving over 12,000 advertisers worldwide with direct relationships with 17,000+ publishers. Criteo ads reach over 1.1 billion unique Internet users (comScore, September 2015).

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For 60 years, **SG360°** has been a pioneer in direct marketing solutions. Leveraging the power of print to create connected experiences across channels, we push the envelope to deliver inspired communications that are touched, shared and remembered. Nowhere else is the art of direct marketing so masterfully executed.

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