

MEASURING MARKETING IN THE MOMENT

MARCH 2020

UNDERSTANDING HOW
SHOPPERS REACT, TRANSACT AND
INTERACT IN **REAL-TIME**



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INTRODUCTION

More than ever, brands need to deliver the right message to the right person at the right time over the right channel — they must act in the customer's moment of need. Yet many brands struggle to close the gap between customer need and marketing action. Many lack the responsiveness to even adjust advertising campaigns based on consumer responses to those campaigns.

Four out of five marketers surveyed by The CMO Council say they're challenged to meet consumer expectations for personalized engagement. Nearly half cannot or do not leverage in-flight analytics to adjust their advertising and media mix in the middle of campaigns to optimize results.

ONLY 5 PERCENT OF RETAIL MARKETERS SAY THEY HAVE THE RIGHT DEPTH OF DATA

Wes Chaar, Executive Vice President, Chief Data and Analytics Officer at Catalina, says the challenge of reaching consumers in their moment of need is becoming both more feasible due to greater access to shopper data, but more challenging due to the fast-changing needs and preferences of consumers.

"Shopper-specific personalization requires confident data, confident return on spend and practical delivery methods," says Chaar. "Now that shopper-level purchase data is becoming more accessible, those barriers are starting to fall away for other marketing channels. The challenge is that shopper's preferences are becoming more nuanced, making 'mass personalization' even harder to scale. A shopper's nuanced buying behavior (i.e. shopper personalities) needs to be systematically identified and maintained so they can feed automated delivery systems based on brand objectives and campaign rules, not dozens of time-consuming manual sub-campaigns that become impractical to most advertisers."

Brands not only miss the moment, they often make matters worse.

Today's consumers value time and privacy and won't stand for brands that disregard their wishes. Blast consumers with off-target messages in a poorly timed marketing campaign or push personalization to the point of creepiness, and you can forget about engaging customers in a meaningful way.

Case-in-point: Retailers experimented with geo-fencing by sending text messages to people walking or driving near their stores. They promoted special discounts in



an attempt to lure them in. Never mind if the person intended to buy something or not. Most were merely making their way to their next destination. Creepily, the underlying message in the text was that brands were tracking people's movements.

Some retailers smartened up and began offering discounts over a mobile app when someone came into their parking lot. The mobile app meant that the person was a little more committed to the brand, and the location of the parking lot showed buying intent. It's an example of winning in the moment of need.

"The relevance of it being as close to the point of sale or close to the planning process is really fundamental here," Jonathan Lorenzini, founder of Advertsing and Marketing Analytics, says.

For the most part, though, brands aren't winning in the moment. It is invariably a combination of factors that is holding them back. It might be that they lack

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—Wes Chaar, Chief Data and Analytics Officer at Catalina

the right leadership, analytics, real-time systems, processes, orchestration, budget and customer intent data to pull it off. The latter is the most problematic. Only five percent of marketers are satisfied with the quality and granularity of data that powers their consumer engagement activities and campaigns, according to The CMO Council.

To better understand the challenges of winning in the moment, The CMO Council, in partnership with Catalina, surveyed 150 marketers and conducted in-depth interviews with leading executives.

Among insights gleaned from this study is this key finding: Most marketers know they have a blind spot when it comes to marketing in the moment.

For them, the march toward real-time personalization at scale is painstakingly slow, a mirage in the distance. With campaigns, for example, it takes too long to move from insight discovery to action and on-the-fly adjustments.

Brands are not accessing the data they need at a speed that allows them to adjust to consumer behavior. Multi-touch attribution, for instance, can show the value of marketing's efforts, free up budgets and drive aggressive marketing initiatives. Yet, most marketers say they do not currently have access to multi-touch attribution to drive better performance.



In-flight optimization requires truly rapid access to performance data and a system that can understand the current situation of an offer or a campaign, i.e., how many impressions have been delivered, how many shoppers who received impressions have purchased or redeemed thus far, how much time is left before the end of distribution and other factors, says Catalina's Chaar. "The next key is to understand which optimization knobs and levers can be adjusted to steer the campaign towards meeting its budget or maximizing some profit measure."

Says Nic Umana, Global Digital Shopper Insights Lead at Mars Wrigley: "We run standups — daily or weekly depending on the campaign — to review dashboard data and make sure our campaigns are delivering what we expected. We are ready to pause or pivot if we need to. This becomes the way of working that

NOT A SINGLE MARKETER CAN MOVE STRAIGHT FROM INSIGHTS TO CAMPAIGN

we need to adapt to moving forward. We are constantly reviewing our metrics of success and trying to predict new ways of creating value and measuring the value we have created. If consumer behavior and the media landscape is changing, so to must our metrics of success!"

Even if brands are able to prioritize marketing in the moment, it won't be easy.

The challenge lies in gathering buyer intent signals and point-of-sale data, analyzing and predicting behavior at machine-learning speed and scalability, and delivering the right engagement in real-time, at the critical moment when the customer is in the throes of a decision.

Nevertheless, the study has a silver lining. There's a giant competitive upside awaiting the brand that can figure out how to win in the moment. Only 3 percent of survey respondents said their organization was exceptionally effective in turning data and intelligence into actions. This means that the ones who do will capture the customer interaction in their market.



KEY FINDINGS

THE STATE OF MARKETING IN THE MOMENT

Despite all the hype around real-time personalization and delivering the right message to the right person at the right time, the customer's moment of need is still there for the taking. Whether brands are trying to seize the moment at the point-of-sale or in a marketing campaign, the harsh reality, our study shows, is that marketers are failing.

Four out of five marketers said they're either challenged or struggling to meet consumer expectations. Only 3 percent of marketers said their organization was exceptionally effective in turning data and intelligence into actions. In fact, most said they're moderately effective at best, with half saying they're ineffective.

The excessive time gap from insight to action is real, too. Seven out of 10 marketers said the lag takes longer than desired. Many of them added that the lag hurts their ability to make a real impact. With marketing campaigns, 53 percent of

marketers said it takes a long time, even far too long, to move from insight discovery and planning to action and campaign delivery.

In fairness, the customer's moment of need is a fleeting window of opportunity for marketers to make an impression. Getting it right is hard work.

"The consumer journey is no longer predictable or linear, rather we have to find those moments of discovery where we can deliver a smile and, hopefully, a chocolate," says Umana. "We have prioritized 22 moments that we think represent the biggest opportunity for conversion, either to eat or buy."

For instance, the top three influences on media mix management are media's cost and efficiency, prior budget allocations with modest adjustments, and marketing or media mix modeled sales impact. Campaign audience development, messaging and other factors are set through top-down planning. All of which don't reflect current campaign performance.

As a result, marketers are unable to make changes in-flight to catch the consumer in the moment.

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“One of the biggest problems that we see structurally is organizations making budgetary decisions at a very high level,” Lorenzini says. “They’re far removed from the learnings of those closest to consumers — the people operating on a day-to-day engagement. This top-down planning makes it very difficult to have slush funds or flexibility.”

“One major factor which can hold back marketers from delivering value is a persistent desire to rely on heuristics, tribal knowledge or gut feel about what works and what doesn’t,” says Chaar. “Being data-driven is to be humble in front of the reality of what shoppers do or don’t do, whether or not what they actually do conforms to our pre-conceptions. To be data-driven is to test and learn, to be nimble in adjusting media delivery as the actual results warrant.”

RECOMMENDATION:

Empower marketers who engage with customers daily and possess the best customer insights to make in-flight adjustments.

MARKETING’S NEW BATTLEFIELD

Help doesn’t appear to be on the way, at least not anytime soon. Half of marketers said personalization capabilities within their organizations are evolving slower than desired. That’s the good news. An additional 12 percent say their personalization capabilities are stagnant, 5 percent say personalization has not evolved in any significant way, and 2 percent say they’re totally stuck with no real strategy to shift the status quo.

When marketers swing and miss in the customer’s moment of need, there’s a heavy price to pay. Not only will marketers strike out on engaging the customer, they might hurt their chances for a future relationship and tarnish the brand’s image.

Indiscriminate marketing campaigns that flood people’s inboxes with off-target emails won’t win marketers any awards. It’s the reason why consumers actively block brands with tools like ad blockers and intelligent agents.

“If you’re just blasting them with messages without thinking about their pattern of behavior, then you’re just annoying them,” Lorenzini says.

On the flip side, there’s much to be gained by winning in the moment. Lorenzini has seen retailers dramatically increase profitability and store visits by delivering discounts, even freebies, to regular customers at the right moment based on their historical buying behavior. These repeated engagements create a pattern, a desire for the product, that carries on after freebies end.

**RECOMMENDATION:**

Prioritize marketing in the moment by gaining leadership buy-in, investing in personalization, and creating better orchestration between team members, vendors and partners.

PITFALLS OF PERSONALIZATION

For every success in marketing in the moment, there are lots of failures. Marketers face many pitfalls on the road to real-time personalization. Chief among them is a lack of buyer intent data.

Nearly 60 percent of marketers point to inconsistencies with the level of depth and granularity of customer insights, while 36 percent admit they just don't have the data to know their consumers. Among the top six reasons for the lag in timeframe from collection to actionable insights, four are data-related: complexity of data and analytics, teams not staffed to meet timelines and needs, siloed data, priorities shifting attention away, hard-to-access data, and lack of shopper-level data.

"It's very hard for CPG companies to get point-of-sale data — that is, the basket of goods — yet it's the most fundamental data set that can help change your strategy," Lorenzini says. "It's really where the rubber meets the road."

In the survey, marketers expressed a desire for more personalized data (e.g., previous purchases), near-time data (e.g., social media behavior), and real-time data (e.g., live shopping cart). CPG companies will need to strike up data partnerships in order to get consumer intention triggers.

Getting closer to buyer intent frequently requires the convergence and analytics of multiple data sources. Marketers also need granular data-based signals to drive automated campaign optimization, says Chaar. This can be real-time sales signals or sales correlations to external data such as weather, pollen count, school schedules, etc. This data, along with machine learning, can ensure retailers have the right over-the-counter medications before local shoppers start sneezing or coughing from springtime allergies or winter colds.

RECOMMENDATION:

Focus on gathering real-time sales signals and buyer intent data, such as the basket of goods, even if this means partnering with third-party data providers.

Even if brands have the data, marketing teams closest to understanding in-flight results lack the authority and budget to make mid-course corrections. A third of marketers said they do not have the capacity to adjust content or distribution in-flight to meet observed or forecasted campaign goals and targets.



Umana also warns that the lack of all the possible data cannot be an excuse for leveraging the insights you do have or for exploring new approaches that ultimately can deliver valuable insights. “The only way to stay relevant is to experiment all the time. Gone are the days of set and forget. We are working constantly to stay in tune with what is important to consumers, and show up in ways that add value based on their evolving behaviors.”

EFFECTIVE PERSONALIZATION STARTS FROM CAPTURING THE RIGHT DATA

“Sometimes marketers can become paralyzed by the data,” she adds. “The business strategy and business problems to be solved need to guide the analytics. We are focused on a learn-test-learn approach, prototyping multiple solutions to a problem, testing them out and optimizing them prior to scaling them up. This is quite a different business model for us, but one that is providing some real insight and reward, and drives confidence to back the ‘Big Idea’.”

Other pitfalls can trip up marketers as well. Differing priorities delay timelines. Current systems don’t support automated responsiveness. Too little budget prevents marketers from doing anything more than reporting on past actions.

CROSSING THE CHASM BETWEEN INSIGHTS AND ACTION

Marketers can make strides in crossing the chasm between insights and action. For starters, they need to create multi-touch attribution models that assess the value and impact of each point of media engagement and can help free up budget.

In the survey, marketers said one of the greatest challenges in delivering personalized experiences was measuring the impact of engagement. Too many marketers are stuck in traditional ways of defining the success of their media mix.

Nearly two out of five marketers said current metrics don’t fully track, assess and measure the value and impact across the media mix. Only 5 percent are able to act immediately, from intelligent gathering to insight discovery to action. Only 17 percent said they’re able to course correct with campaigns in-flight.

What’s needed is more immediate insight. Nearly 40 percent of marketers said other metrics are needed to be brought into the mix, in order to get a more accurate and meaningful view and make adjustments in-flight.

Many marketers said their biggest need is online to offline multi-touch attribution to show how digital campaigns impact target audiences at point-of-sale. In-flight metrics such as multi-touch attribution and campaign-specific in-flight sales results are typically not being used, but should be.

**RECOMMENDATION:**

Develop better ways of measuring the impact of personalization engagement and seek solutions for multi-touch attribution to show the value of these efforts.

If marketers want to win in the moment, they'll have to make the moment a priority. This means effecting better orchestration among team members, vendors and partners, as well as convincing leadership to invest in data gathering, analytics and other technology.

There's no question new technology will come into play. Consider the case of a candy maker wanting to deliver a discount for a candy bar over a mobile app while the consumer is in the checkout line. How will the brand know when the consumer is close to the register?

"Look for Bluetooth cell signals scrunched together," Lorenzini says. "That's the time to serve up an impulse buy, hitting them exactly where they need to be, for them to reach from the aisle and put it on the checkout counter."



CONCLUSION

What we have learned from the research, as well as the best-practice interviews with brand leaders, is that marketers are missing the opportunity for engagement in the customer's moment of need. Several key points quickly emerge as big takeaways from the study:

PRIORITIZE WINNING IN THE MOMENT

A customer has fleeting moments when they're open to the right marketing message, whether it's in a campaign or at the cash register. These are the moments when a customer is won or lost. It's paramount for brands to prioritize them and respond in real-time. This means gaining leadership buy-in, investing in technology such as an automated-response system, and having better orchestration between team members, vendors and partners.

FOCUS ON GATHERING BUYER DATA

In order to properly interact with a customer in their moment of need, brands must understand buying intentions and behavioral triggers. Is your buyer a gluten-free shopper who prefers value over price? This requires a specific kind of data, such as the basket of goods. Brands often miss the moment because they lack the right data.

DEVELOP MULTI-TOUCH ATTRIBUTION AND IN-FLIGHT METRICS

Marketers need a better way of measuring the impact of personalization engagement so that they can make in-flight course corrections. They should also develop multi-touch attribution to show the value of their efforts. In turn, this can free up slush funds and fuel flexibility.

EMPOWER EMPLOYEES WHO UNDERSTAND CUSTOMER DATA

Too many budgetary and planning decisions come from top executives relying on historical data, not rank-and-file marketers who engage with customers daily. When marketing in the moment, however, these marketers possess learnings and insights that can lead to successful in-flight adjustments.

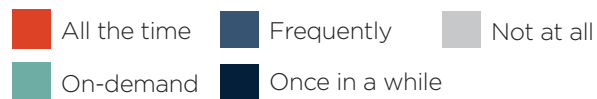


DETAILED FINDINGS

PERSONALIZED MOMENTS VS. MOMENTS OF NEED

Many marketers believe they frequently have relevant — even personalized — communications across channels. The vast majority think they're being transparent, authentic, honest and trusting. But are they being unexpectedly fun in the key moments that will delight customers? Not really.

On a scale of 1 (Not at All) to 5 (All the Time), to what degree do your customers expect the following from their engagements with your brand?



Relevant communications across all channels



Personalized communications based on their behaviors, patterns and requests



Savings, coupons, promotions, perks or rewards for loyalty and engagement



Products that reflect their changing needs and values (like healthy choices, new ingredients, etc)



Transparency, brand authenticity, honesty and trust especially when it comes to their data



Fast, reliable access to information where and how they want to access it



Consistent branding and communication across all touch points



Entertaining, fun and unexpected moments of delight

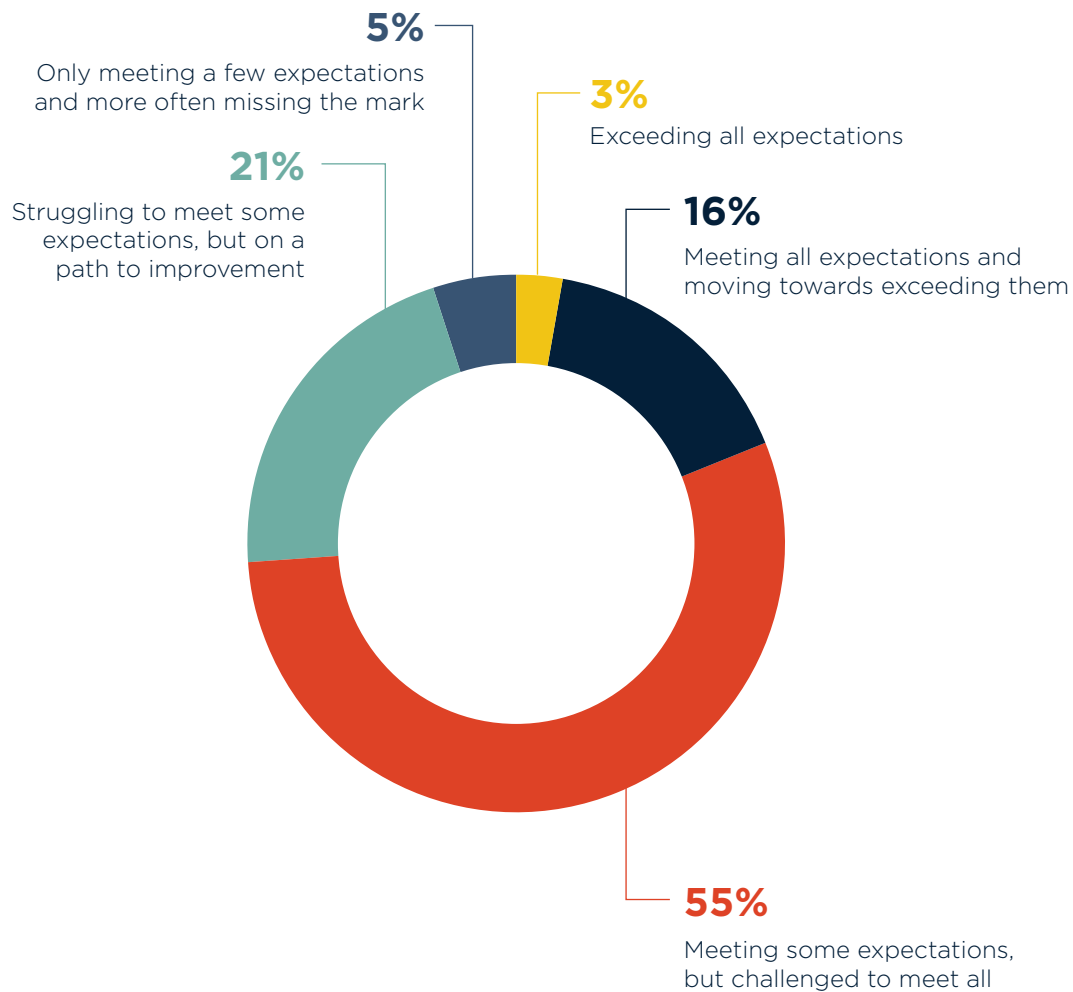




CHALLENGE OF MEETING CUSTOMER EXPECTATIONS

Meeting heightened expectations of today's empowered buyer isn't easy. They want to engage with a brand only when they're ready — that is, during fleeting moments of need. The vast majority of marketers say they are challenged, if not outright struggling, to meet customer expectations.

How close is the organization to meeting these expectations?

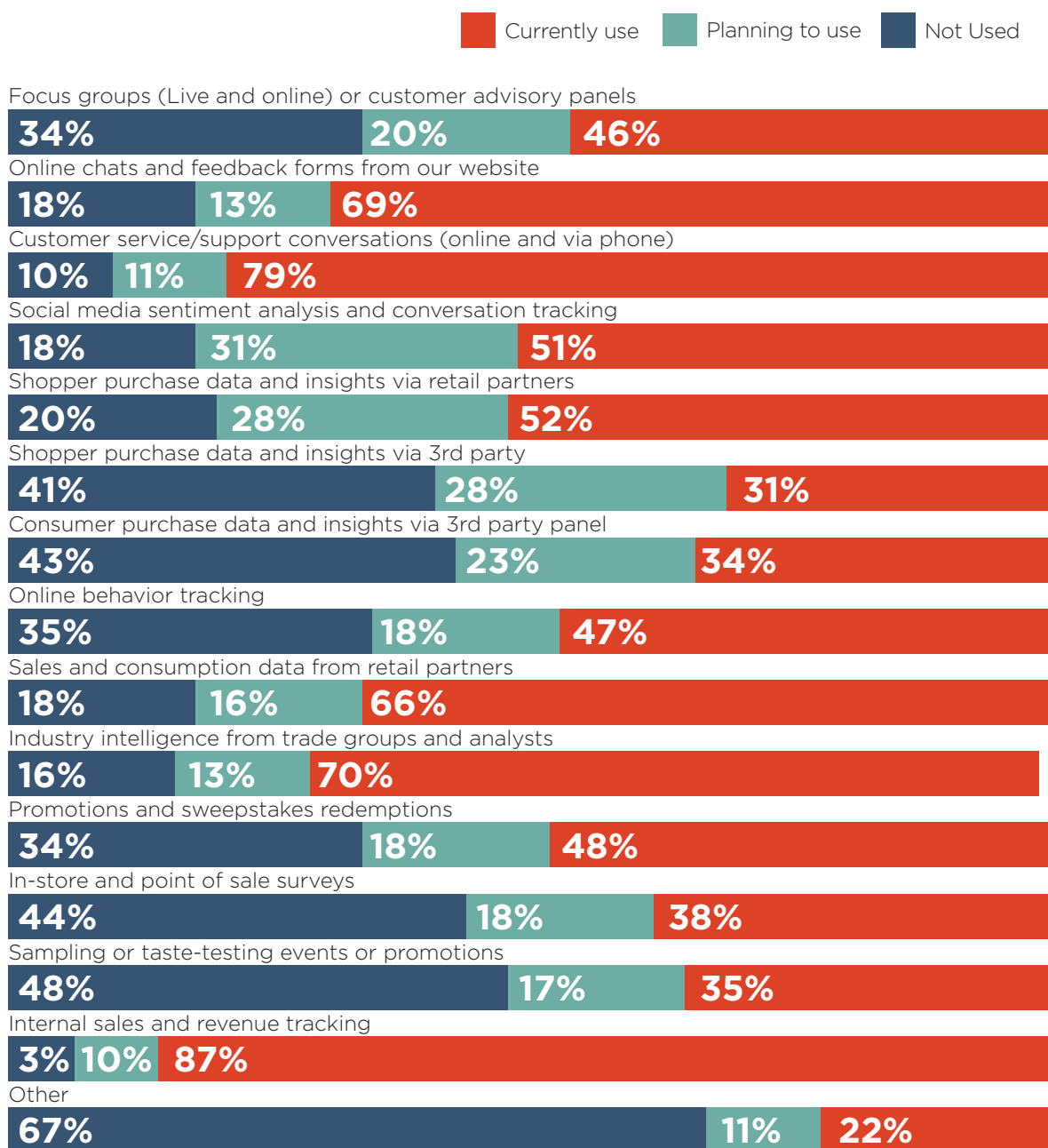




TRACKING BUYER BEHAVIOR

Buyer behavior practically changes overnight. Customers are a fickle bunch. So how do marketers get ahead of shifts in behaviors and sentiment? Answer: a laundry list of ways, especially from customer service and support conversations, industry intelligence from trade groups and analysts, and online chats and feedback forms.

Please indicate which of the below you are utilizing to track customer expectations and needs, including shifts in behaviors and sentiment.

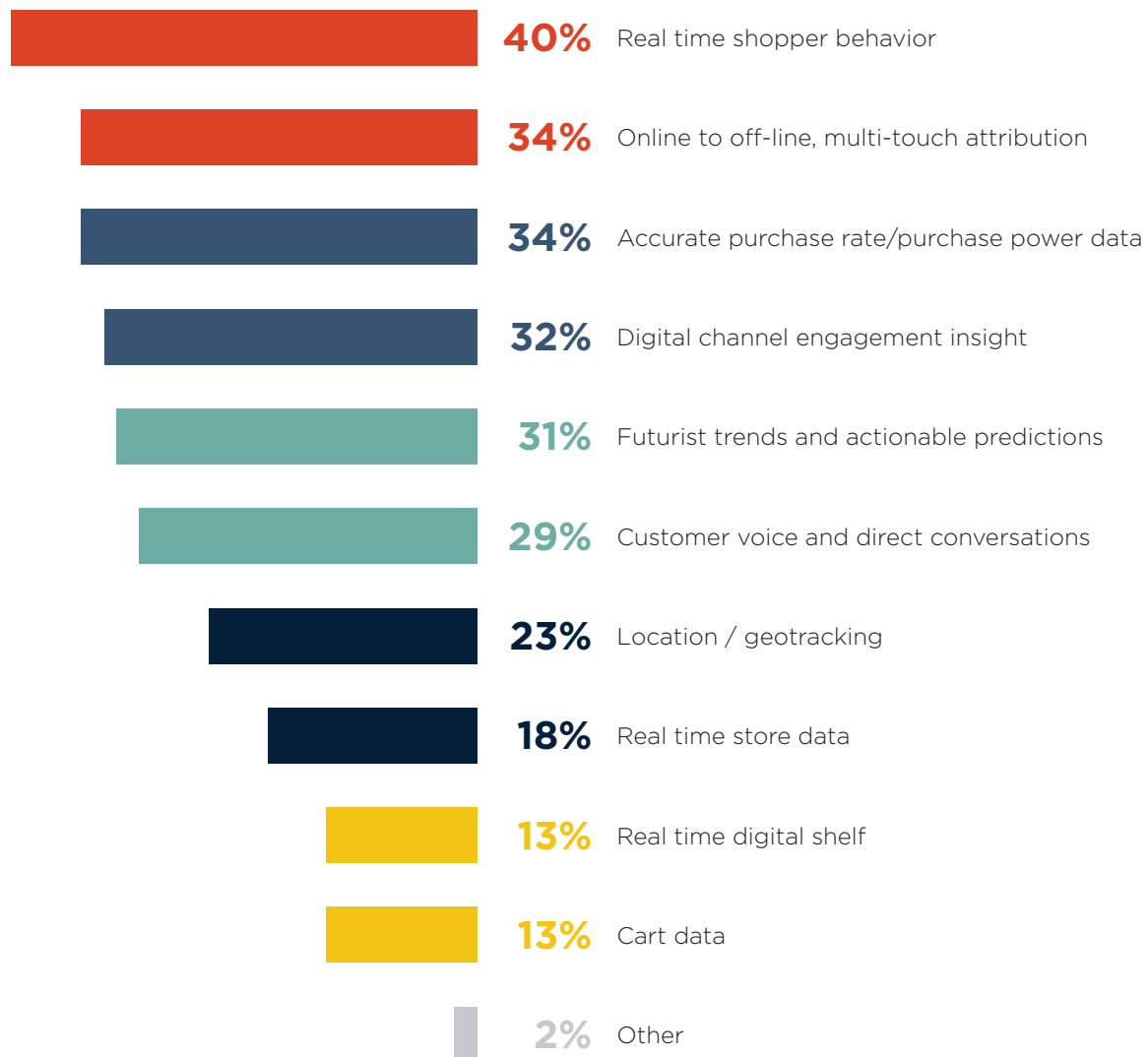




INSIGHTS WISH LIST

Marketers would love certain insights to help them be more effective in engaging customers. Chief among them: real-time shopper behavior. This marks the beginning of the journey marketers must make in order to act in the customer's moment of need. Another desired insight is online-to-offline multi-touch attribution, which would give marketers some idea of the impact of their efforts.

What areas of insight would you most like to have more of? (Choose the top three most relevant answers)

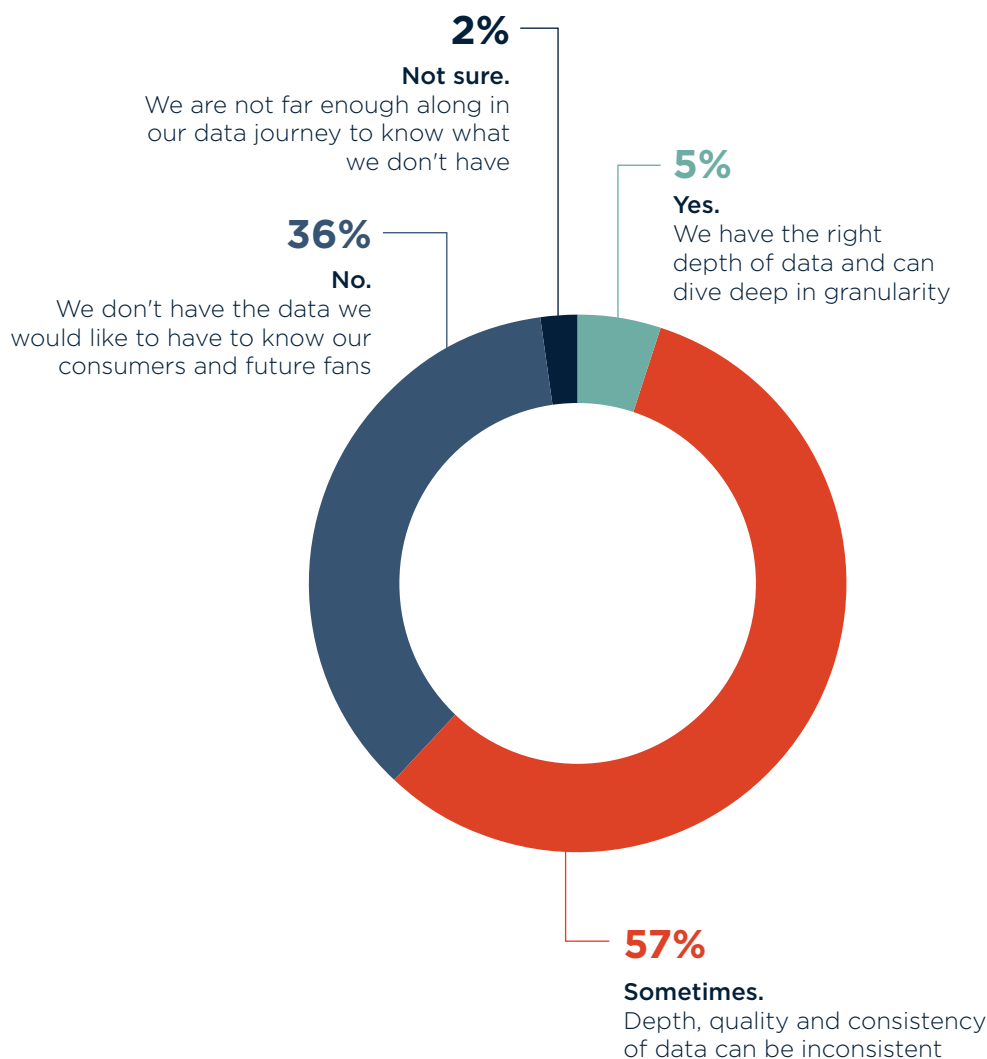




THE DATA BLINDSPOT

Marketers in pursuit of insights must first obtain the right data, since insights sprout from data. To this end, marketers are lacking. Nearly all marketers say either the depth, quality and consistency of data can be inconsistent or they don't even have the data to know their customers. This is a major problem.

Are you satisfied with the level of depth and granularity of customer insight and understanding available across the organization?

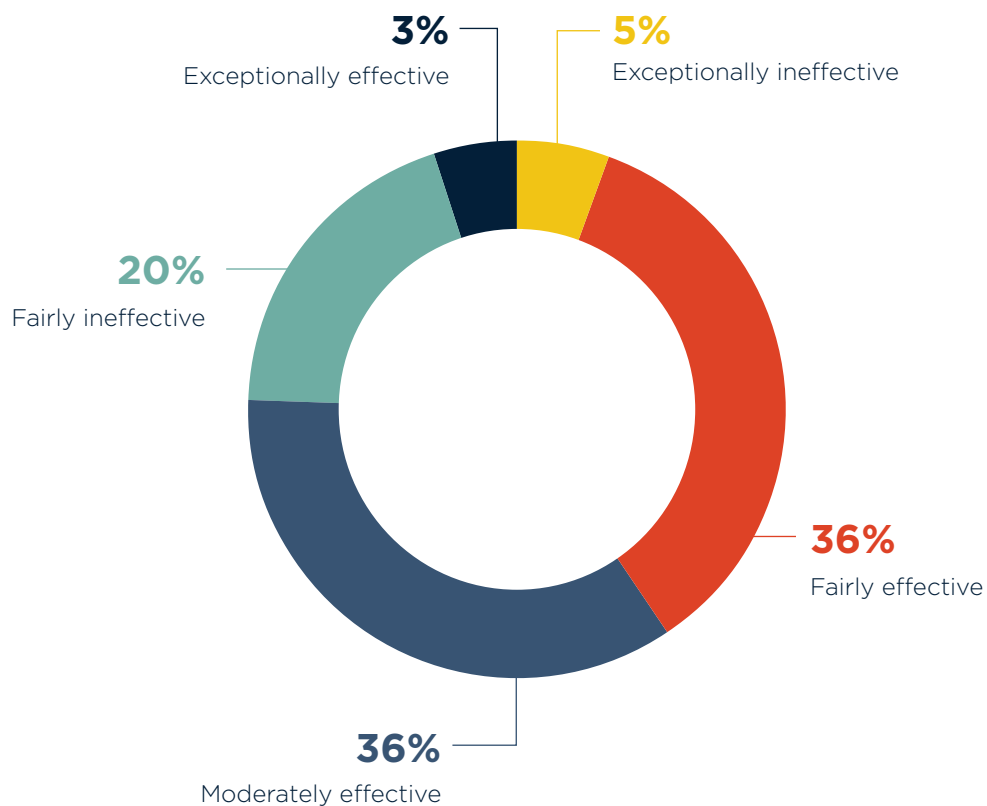




INTELLIGENCE INTO ACTION

Marketers can have the best customer intelligence, but it means little if they can't act on it. The good news is that the majority of marketers feel they're either fairly effective or moderately effective. The bad news is that there's a significant group — one out of four — that are ineffective.

Rate how effective your organization is in turning data and intelligence into actions.

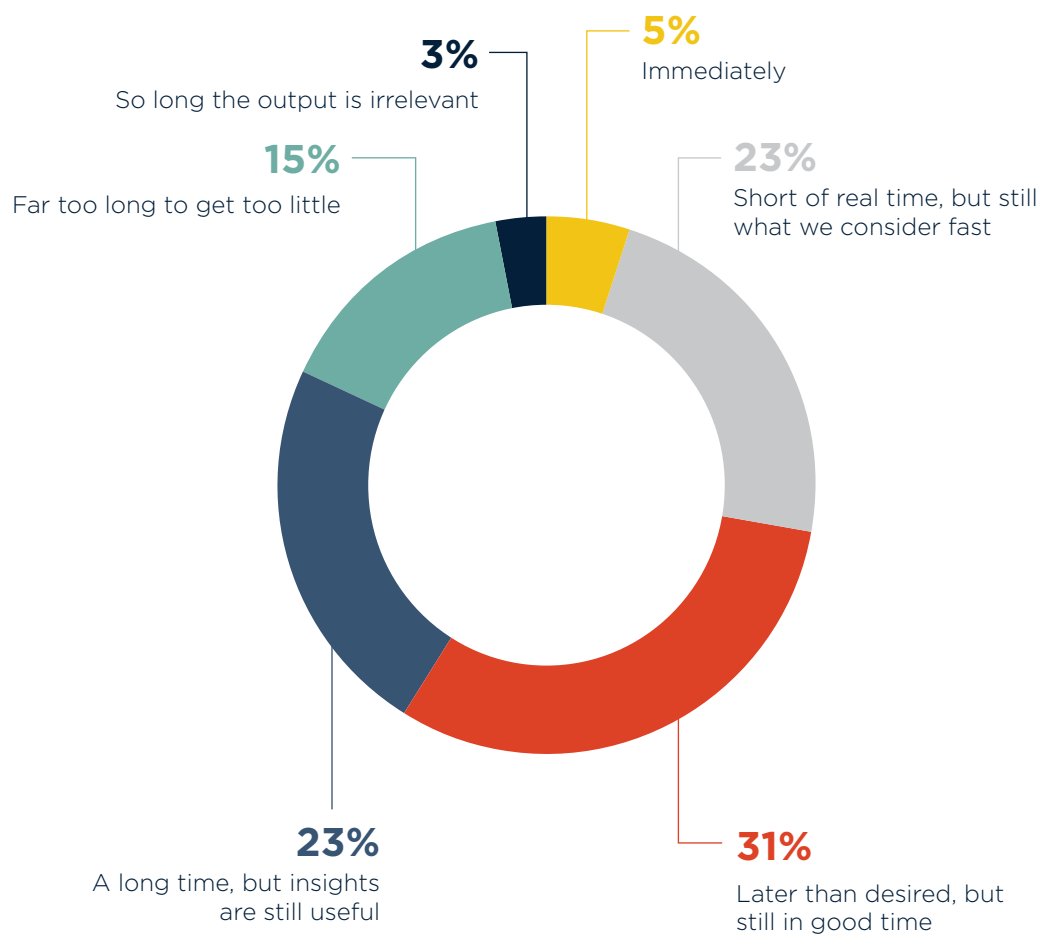




MISSING THE MOMENT

While marketers can pat themselves on the back for turning intelligence into action, too many fail to act in the customer's moment of need. Only 5 percent of marketers says they can act immediately. All others fall into categories such as short of real time, later than desired, a long time, far too long, and so long that it doesn't matter. This should raise alarms.

How would you describe the time it takes to move from intelligence gathering and insight discovery to action?

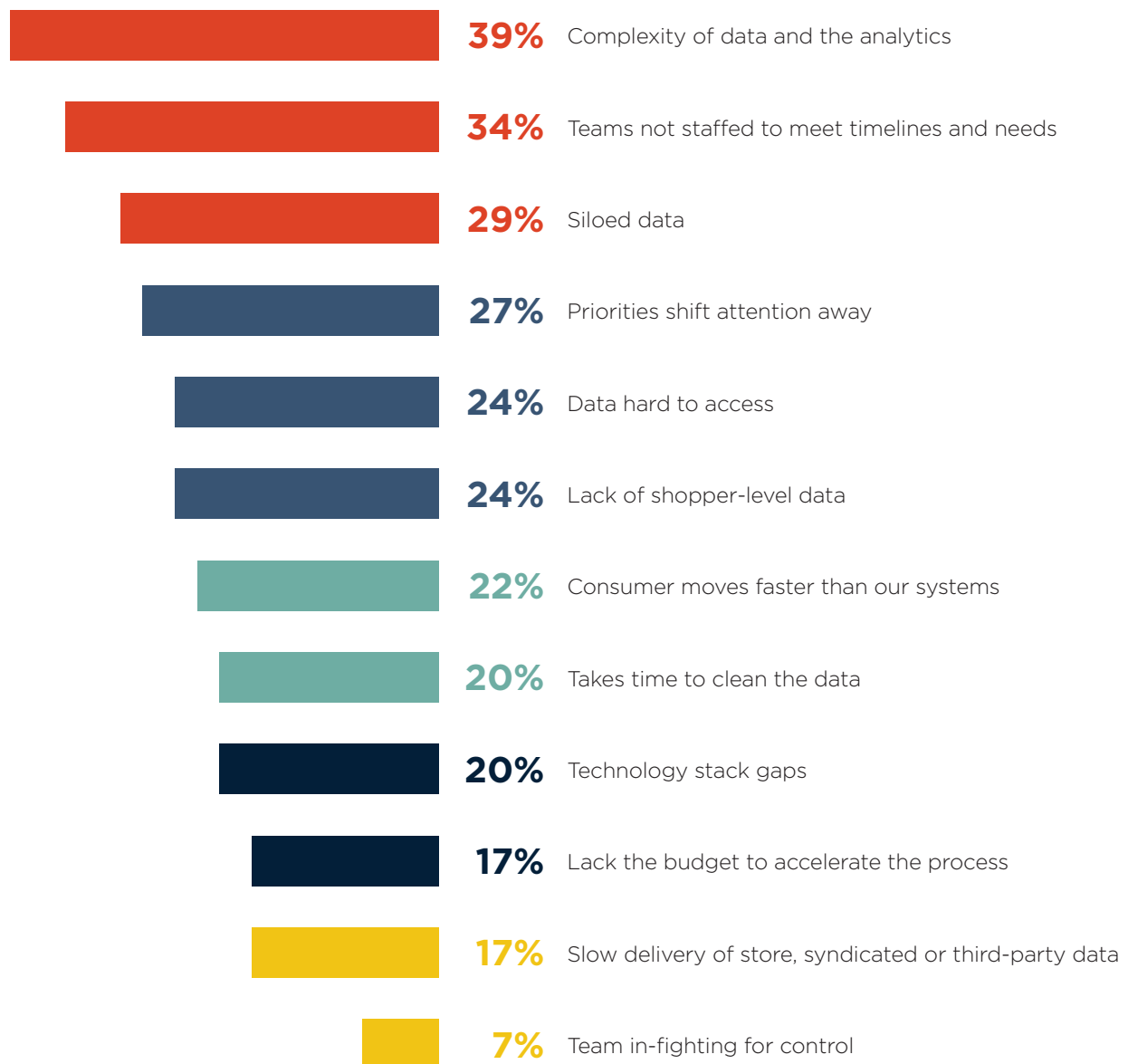




DATA, TELL US WHAT TO DO

What's causing the time lag from turning data collection into actionable intelligence? Data complexity? Inadequately staffed teams? Different priorities? Technology stack gaps? Answer: All of the above and more. Eleven reasons for the lag were given heavy relevance. There are a lot of barriers to overcome, which is why even knowing what to do from the data is challenging and time consuming.

What creates the lag in timeframe from collection to actionable intelligence? (Choose the top three most relevant answers)

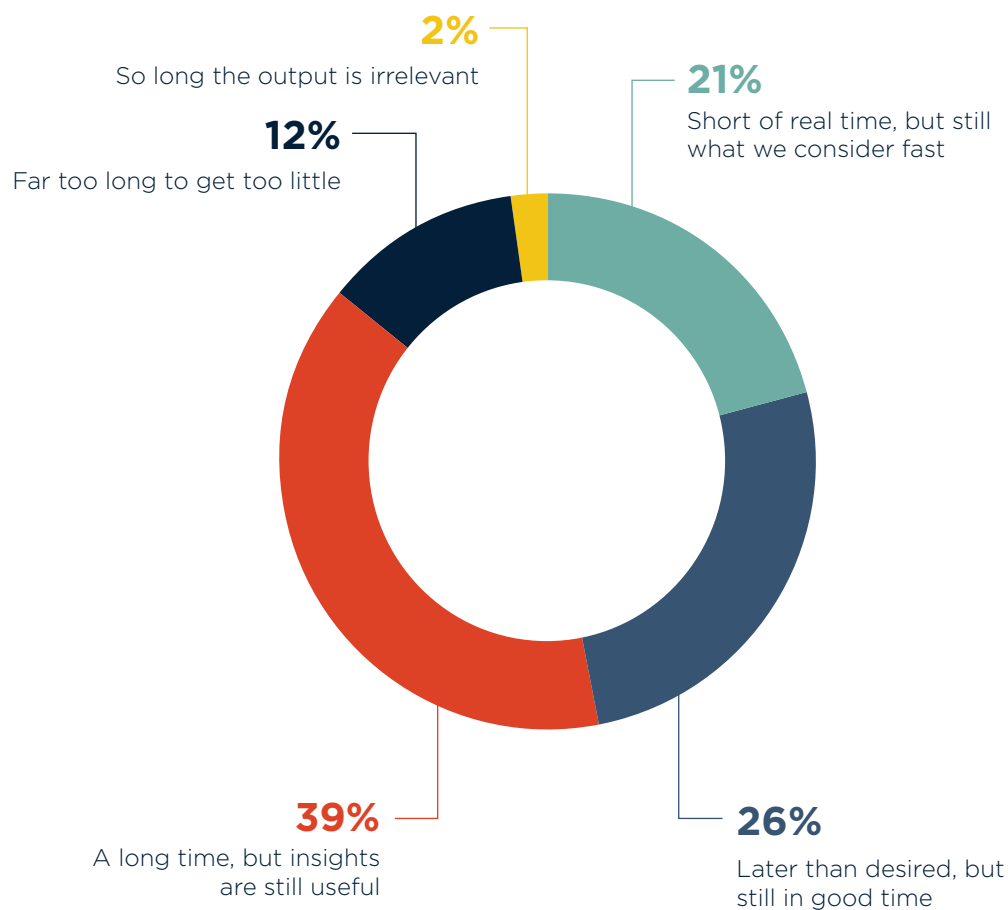




WE'RE STILL WAITING

Two out of five marketers said the time it takes from gaining insight to planning to delivering a campaign takes a long time. Another one out of four said it's later than desired. Given rapidly evolving buyer habits, marketers need to close this gap before insights become stale and irrelevant to the campaign.

How long does it typically take to move from insight discovery and planning to action and delivery of campaigns?

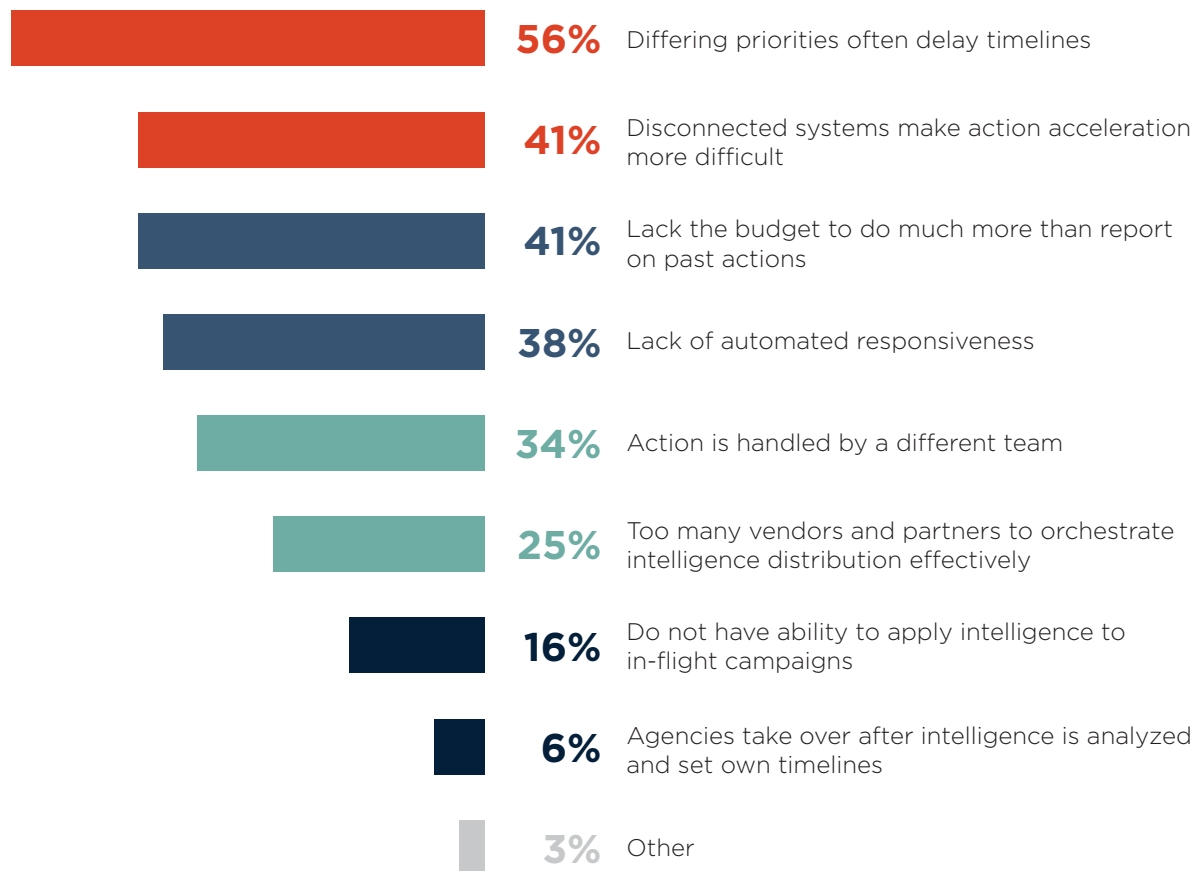




FROM ACTIONABLE INTELLIGENCE TO ACTUAL ACTION

So you've finally arrived at actionable intelligence. How long before you do something about it? Too long. Reasons for the lag in this part of the marketer's mission to reach customers in their moment of need are many. Seven reasons for the lag were given heavy relevance.

What creates the lag in timeframe from intelligence to action? (Choose the top three most relevant answers)

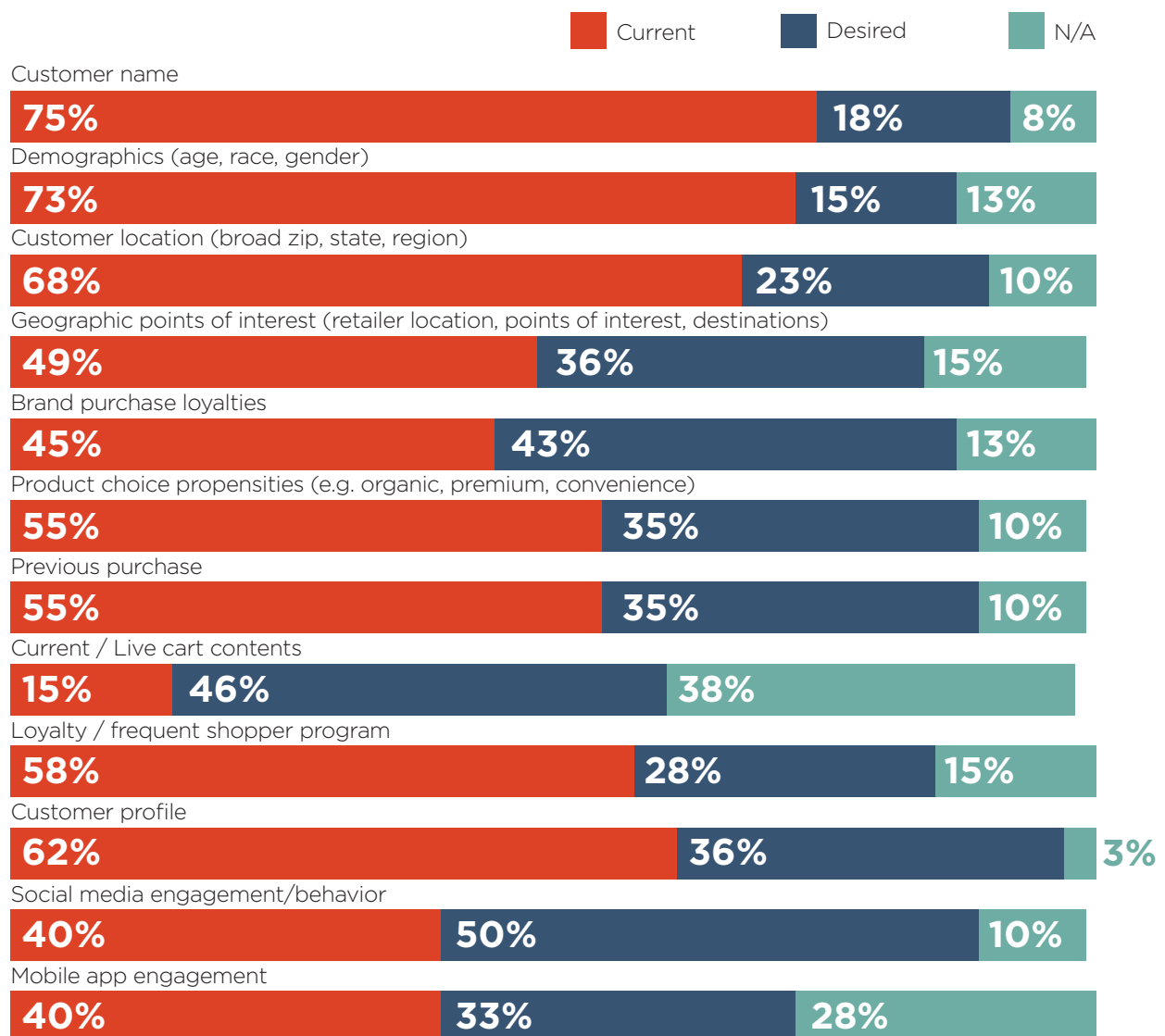




MANY FACETS OF PERSONALIZATION

Marketers collect many aspects of personalization, such as customer names, age, race, gender, zip codes, etc. They build customer profiles. But not all aspects are created equal. Some of the better ones shed light on buyer intent, such as brand purchase loyalties, social media and mobile app engagement, and especially live cart contents.

**Which aspects of personalization does the organization currently deploy?
Which aspects would you like to be deploying?**

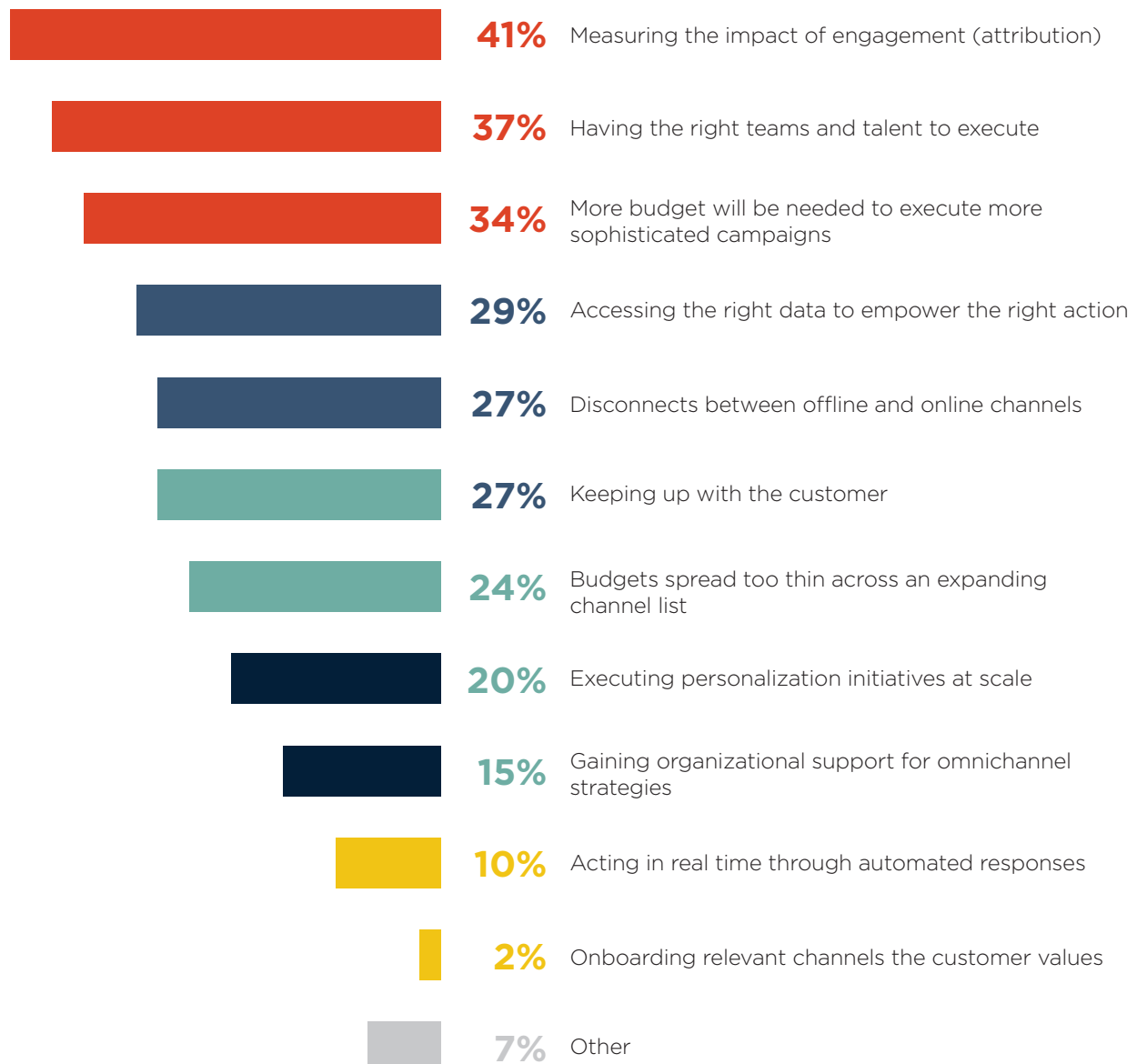




IN PURSUIT OF PERSONALIZATION

Along the road to personalization, marketers face pitfalls at every turn. It makes for quite a slog. There's the inability to measure the impact of engagement, disconnects between offline and online channels, not having the right teams and talent, and the lack of budget. All are related, of course. But marketers must overcome these challenges if they want to reach the Holy Grail of personalization.

**What has been the greatest challenge in delivering personalized experiences?
(Choose the top three most relevant answers)**

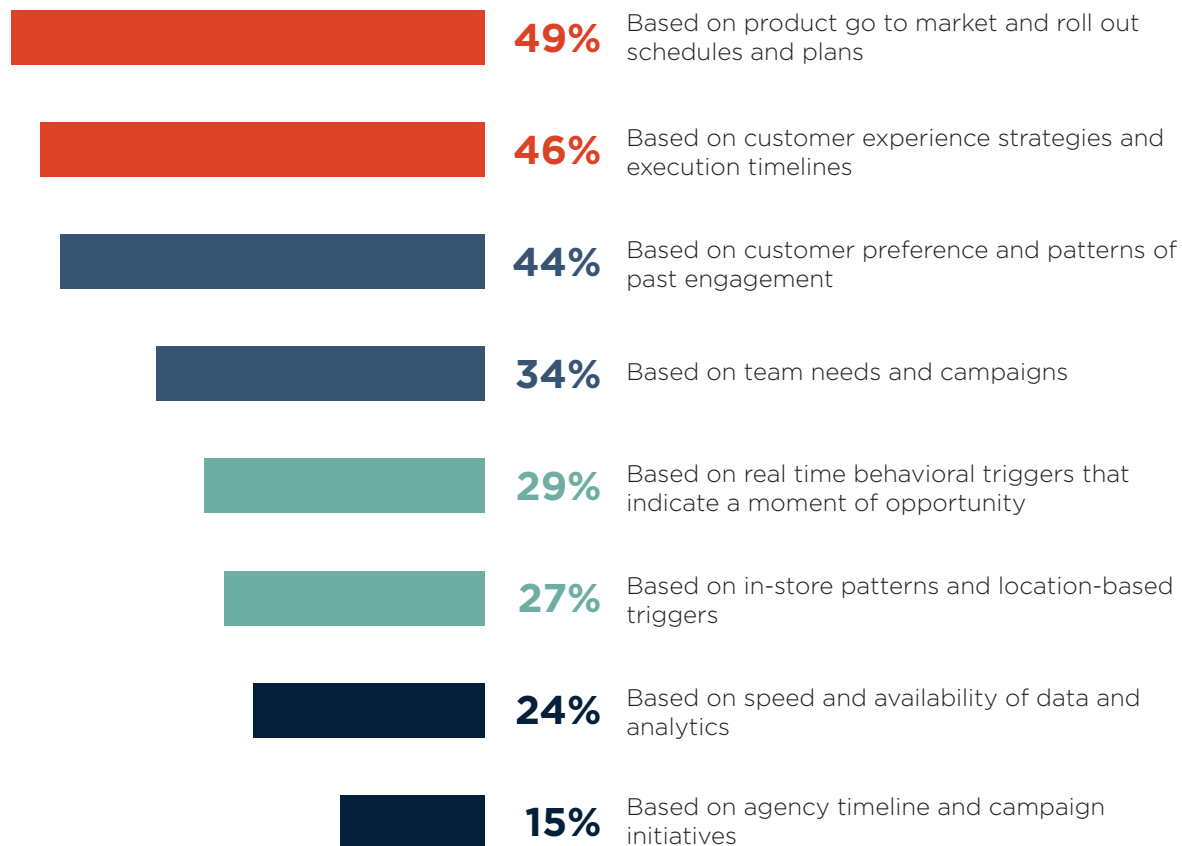




WE'RE NOT IN THE MOMENT

Marketers tend to plan and orchestrate their personalization communications around product launches and internal timelines, rather than the consumer's moment of need. Less than a third of marketers say they use shopper behavioral triggers to initiate communications.

How do you orchestrate and time personalized communications and campaigns? (Choose the top three most relevant answers)

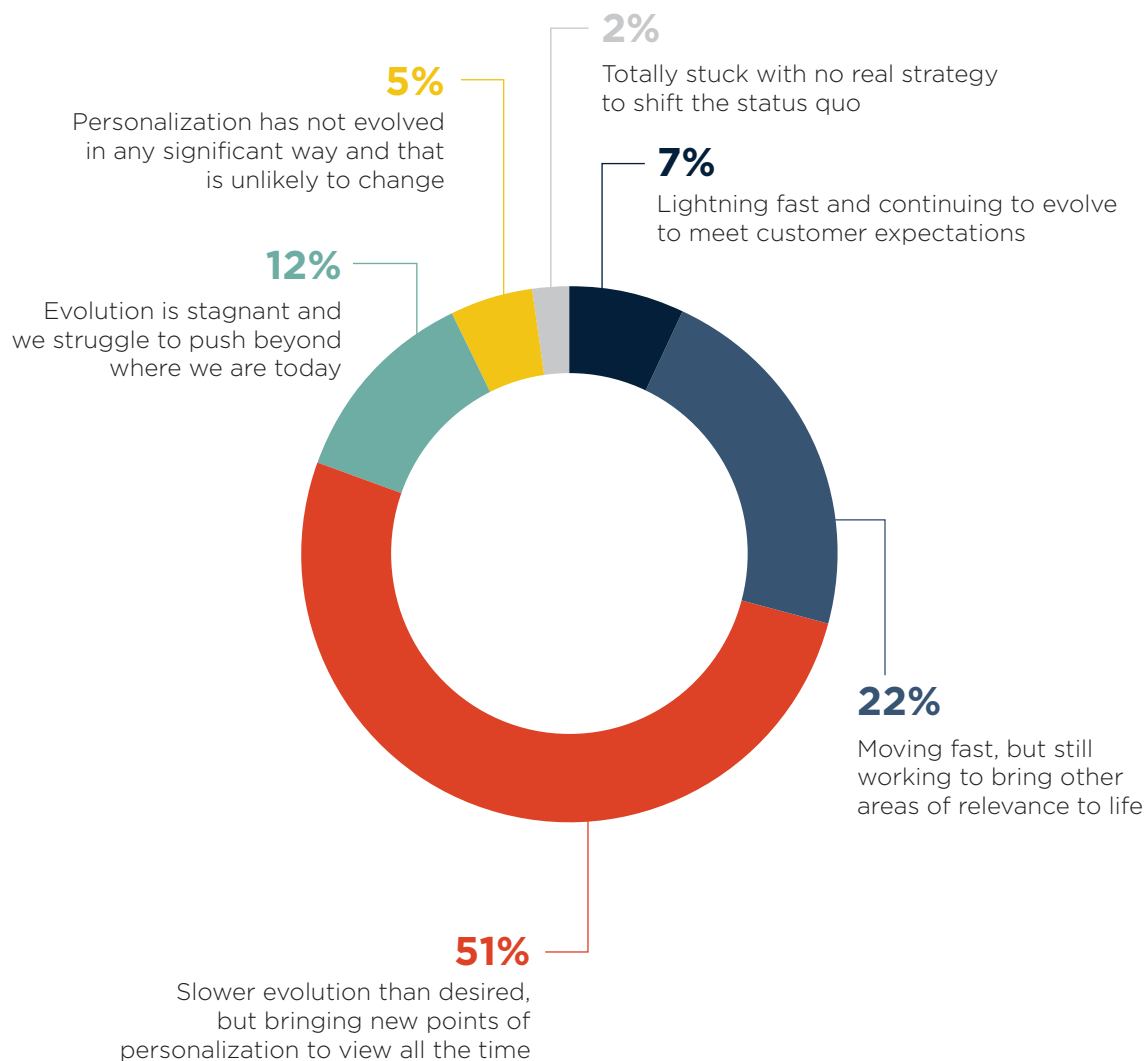




SLOW PACE OF PERSONALIZATION

For many brands and retailers, progress on personalization is moving at a snail's pace. Half of marketers said personalization capabilities within their organizations are evolving slower than desired. That's the good news. Some 12 percent say their personalization capabilities are stagnant, 5 percent say personalization has not evolved in any significant way, and 2 percent say they're totally stuck with no real strategy to shift the status quo.

At what pace has your organization's personalization capabilities evolved and advanced?

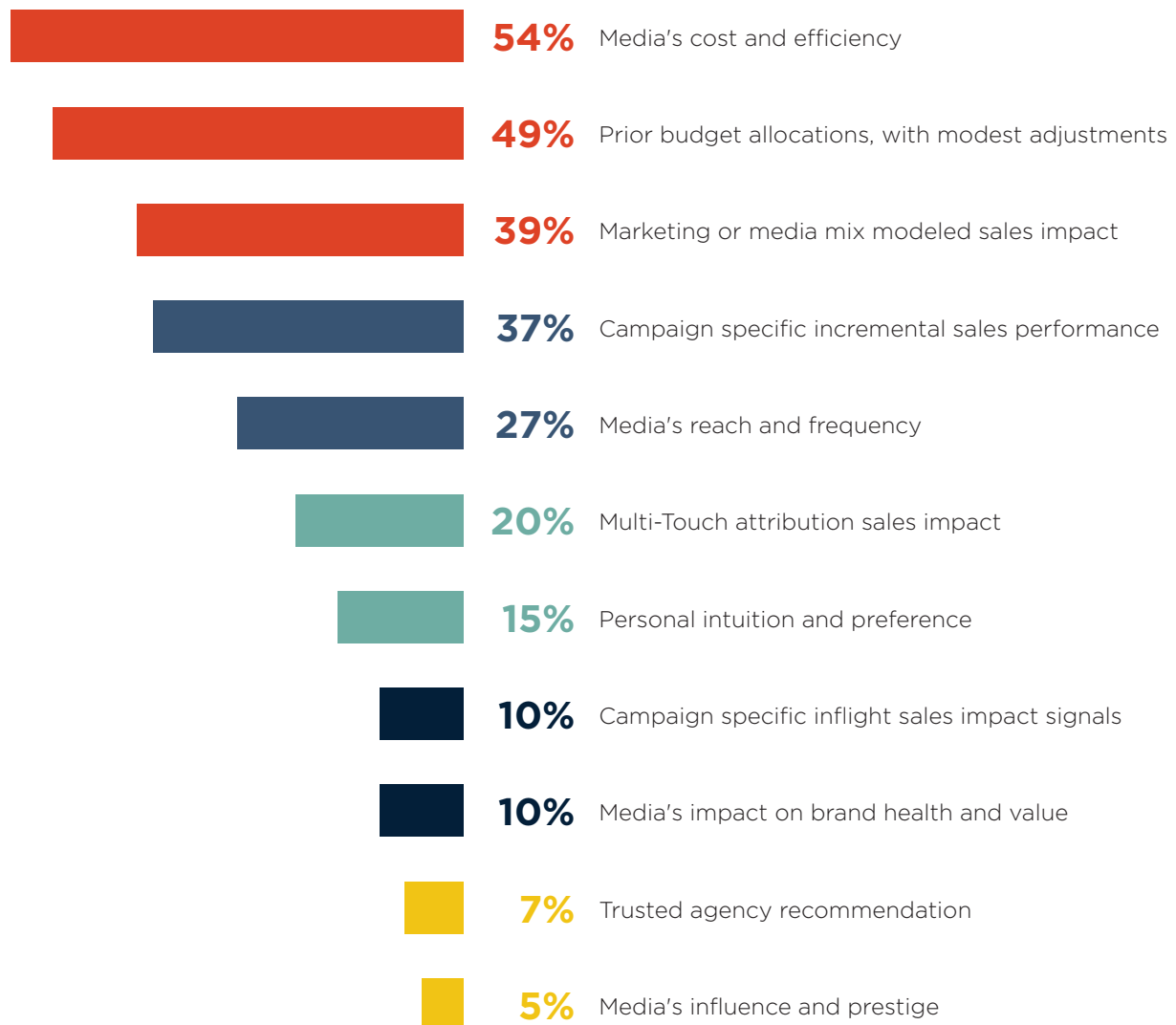




INFLUENCING MEDIA MIX

Too few marketers are using precise performance data and analytics to manage their media mix. Media cost, adjustments to prior budgets and various models are key influencers. While more than a third say incremental sales influences mix, just 20 percent are using shopper-level multi-touch attribution to gain a clear understanding of which media and channels are performing.

What influences your media mix management? (Choose the top three most relevant answers)

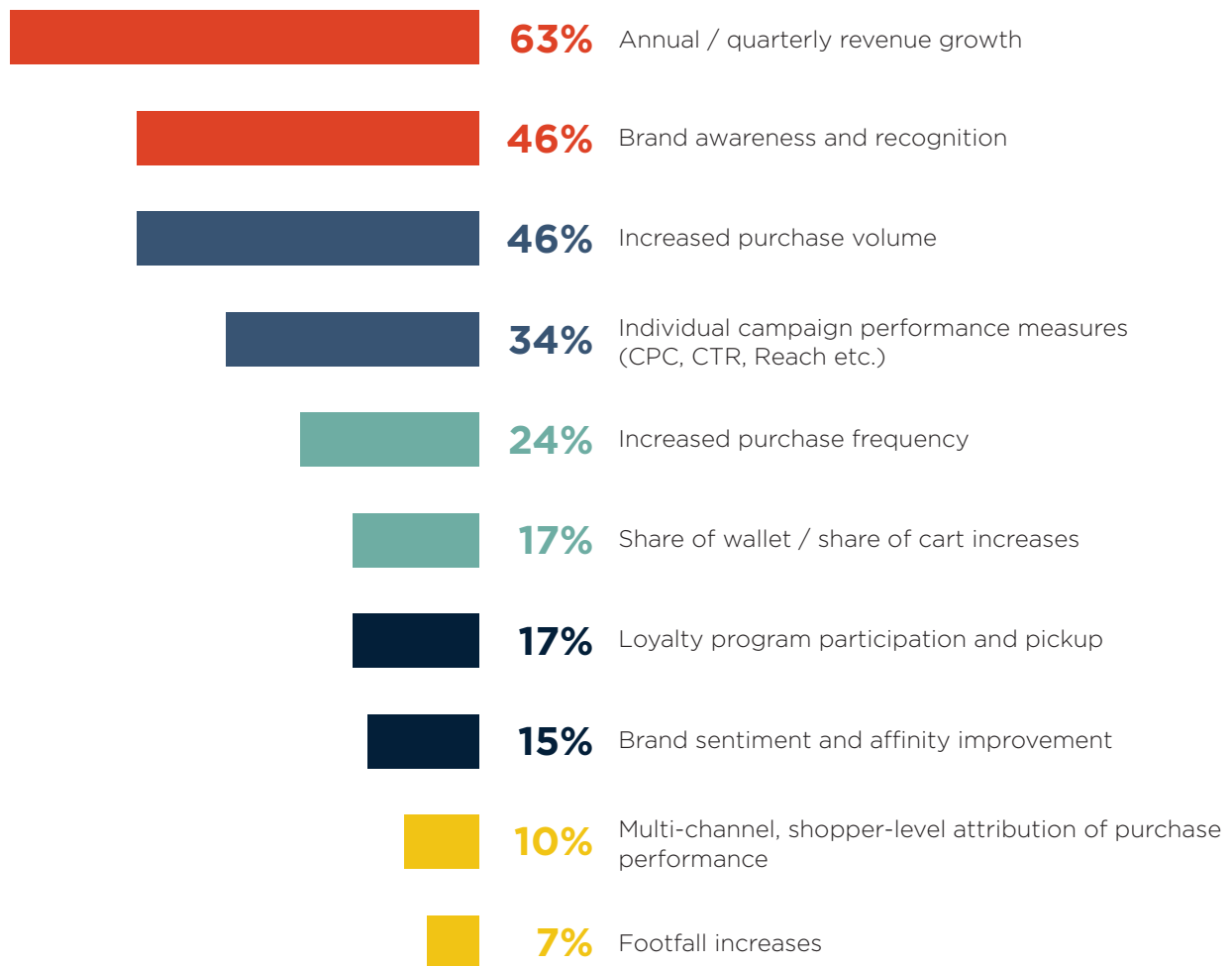




MEASURING SUCCESS

As with the responses to the question above, many marketers are not using the most precise metrics to measure campaign effectiveness. In addition, their favorite metrics — like quarterly revenue growth and brand awareness — lack not only the precision, but the timeliness, to make data-driven adjustments to campaigns in-flight.

What measures and metrics define success of your media mix strategies for the business? (Choose the top three most relevant answers)

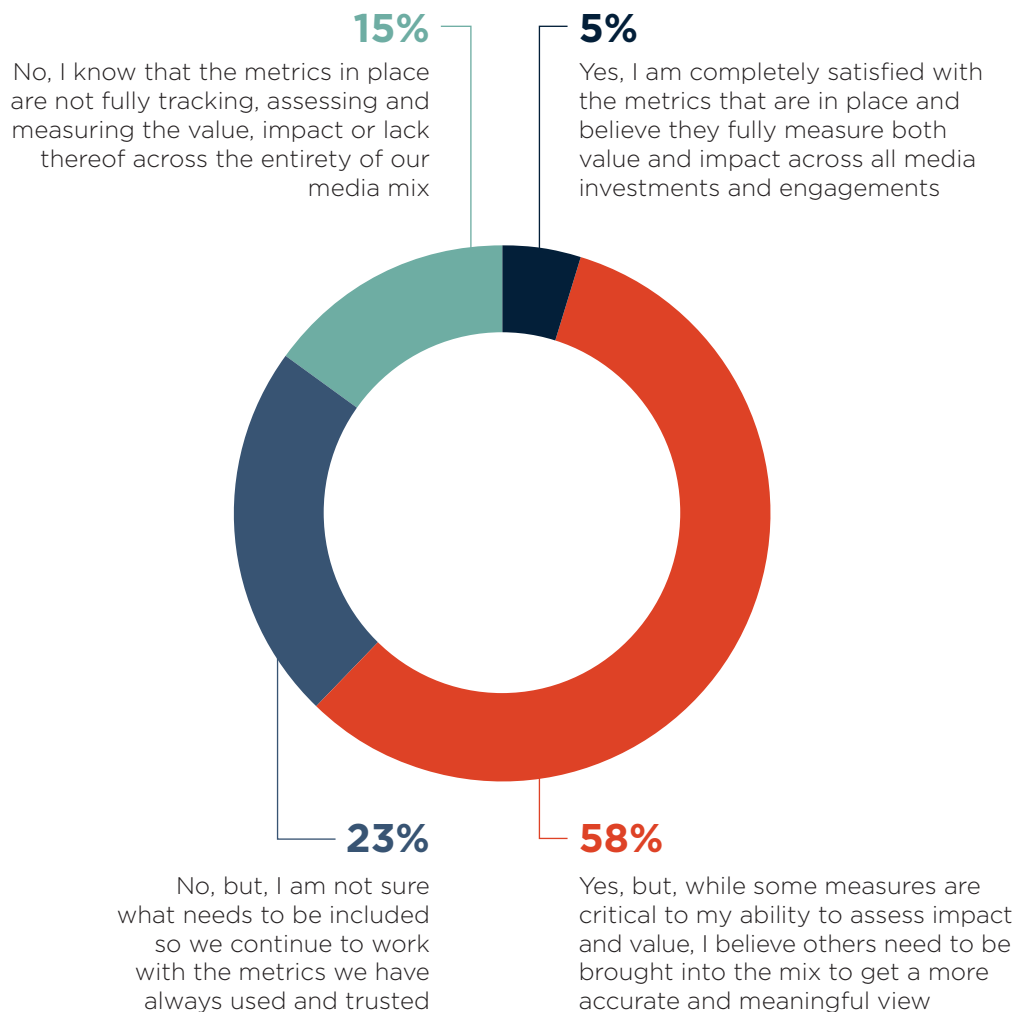




INSUFFICIENT METRICS

The vast majority of respondents recognize their current metrics are insufficient. Only 5 percent express complete satisfaction. While the majority, 58 percent, say they believe their current metrics are valuable in measuring impact, they also believe they need other insights to gain a more accurate understanding of performance. Some 38 percent are even more dubious of their ability to measure media engagement.

Do these metrics adequately assess the value and impact of each point of media engagement?

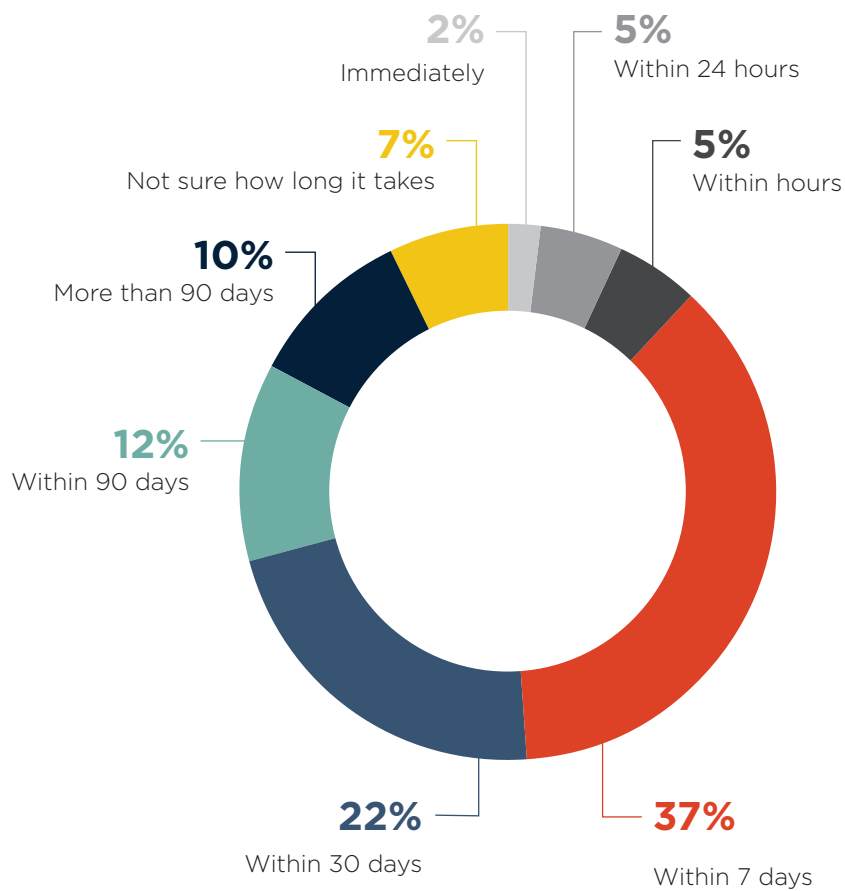




DELAYS IN MEASURING PERFORMANCE

It just takes too long for most marketers to understand how their campaigns and media placements are performing. Half of all marketers say they can only measure the impact of campaigns within 30 days or longer. Only 12 percent have the ability to understand value and performance within 24 hours.

How long does it typically take to measure the impact of media placements and campaign deployments?

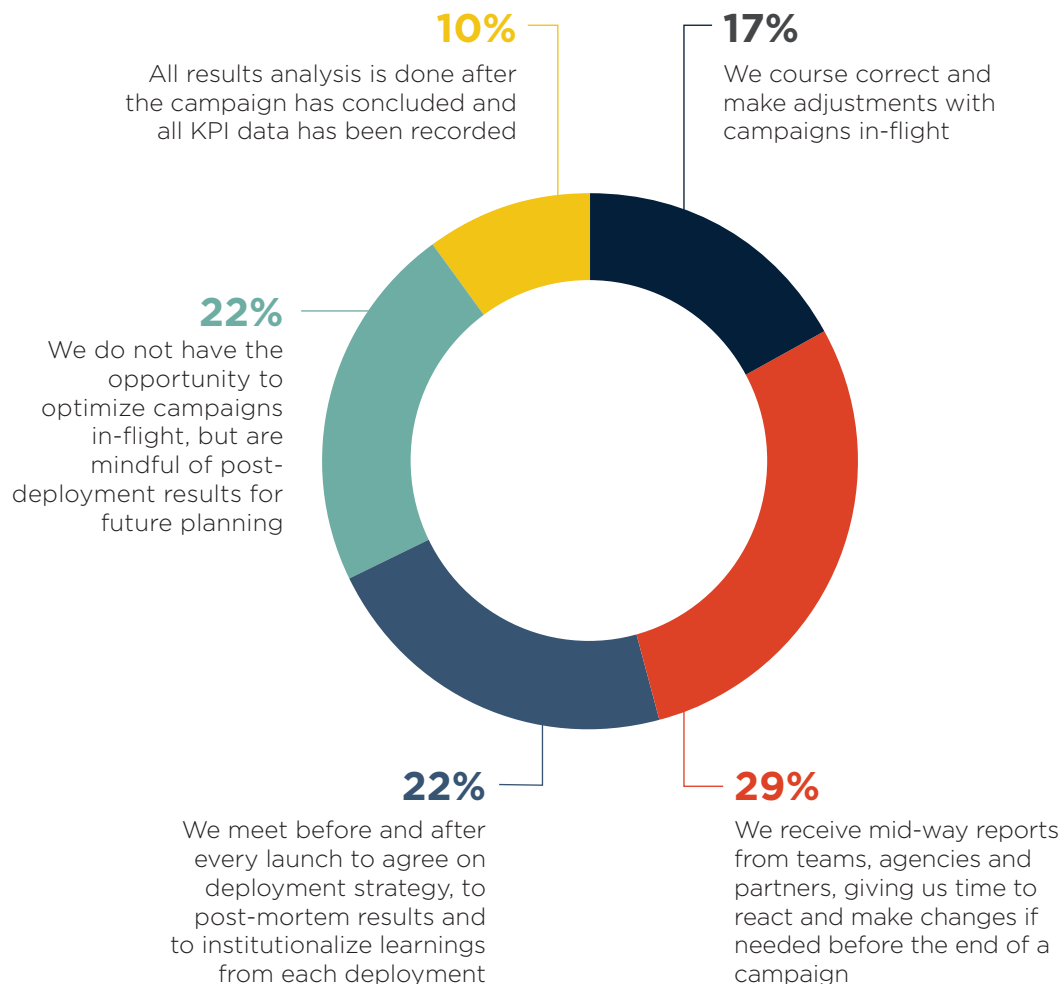




SLOW REFLEXES

The majority of all respondents say they do not have the ability to adjust their campaigns mid-flight. Even among those who do, most say they only look at performance at the mid-point of a campaign, not sooner. These slow campaign reflexes can waste ad dollars and reduce ROI for campaigns.

At what point in the deployment process are you able to assess performance, rework content/strategy and refine direction?





ABOUT CATALINA

Catalina is the market leader in buyer intelligence and optimizing hyper-personalized in-store and digital media to measurably drive, track and measure sales lift, converting shoppers into loyal buyers for leading CPG retailers and brands. Powered by the world's most extensive shopper database, Catalina's mobile, online and in-store networks personalize the consumer's path to purchase, delivering \$7.9 billion in relevant consumer value each year. Catalina has no higher priority than ensuring the privacy and security of the data entrusted to the company and maintaining the consumer trust paramount to the continued success of its business partners and its own. Based in St. Petersburg, Fla., Catalina has operations in the United States, Europe, Japan and Latin America. To learn more, please visit www.catalina.com.



ABOUT THE CMO COUNCIL

The Chief Marketing Officer (CMO) Council is the only global network of executives specifically dedicated to high-level knowledge exchange, thought leadership and personal relationship building among senior corporate marketing leaders and brand decision-makers across a wide range of global industries. The CMO Council's 16,000-plus members control nearly \$1 trillion in aggregated annual marketing expenditures and run complex, distributed marketing and sales operations worldwide. In total, the CMO Council and its strategic interest communities include more than 65,000 global executives in more than 110 countries covering multiple industries, segments and markets. For more information, visit www.cmocouncil.org.



PARTNERS & AFFILIATES



QUALTRICS

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