INNOCASTLE WEBINAR

Three's a Crowd: The use and promotion of new technologies for the creation of digital resources for touristic promotion of heritage through open participation

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My name is Alessandro Manea, I'm the Communications and Digital Marketing Manager for the Fondo Ambiente Italiano. I have been working at FAI for more than 15 years now, and I have really experienced first-hand the evolution and the digital transformation of the Trust.

Today, during these 15 minutes, I will tell you how we set up our user engagement strategies from a digital point of view.

Let's start with the **targets**: what do we want to achieve with our digital and non-digital actions?

Our main target is certainly fundraising and therefore converting users into members or donors. We also have the target of getting users to visit our places or to take part in the events that we organize in the properties or in the squares during the FAI Spring and Autumn Days.

But it is not always easy to achieve conversions directly. It requires a long, complex and delicate process to convince users to support us, to participate in our activities or to visit our sites.

And the **cause** does not help either. Cultural heritage issue is not as immediate and emotional as asking for donations for poor children or endangered animals might be.

This process actually translates into a **relationship**, an ongoing dialogue, with our users to try to understand their needs in depth, get to know them better, collect information on their interests and be able to engage them with the most suitable content.

Another important and necessary topic concerns the **technological environment**.

The **digital ecosystem** in which we work is crucial because it has to be able to support our day-to-day promotional activities, and it has to guarantee efficiency both in the dynamics involving external users (and therefore all promotional activities) and in internal processes.

We have identified three pillars.

First pillar

Master data and its collection within the Oracle database and Salesforce CRM are the basis of our contact activity because it allows us to create a personalized relationship with users based on their characteristics:

There are, however, users that we intercept online without being able to register them: we are talking about visitors of our website or followers of our social networks or the recipients of our advertising campaigns. We have strategies for them too: through retargeting, for example, we manage to get back in touch with them and offer them dedicated content.

Second pillar

KPIs. Data is essential today in any business and even more when it comes to digital actions. Data must be collected and made available and usable in a simple way by everyone.

We must get used to making strategic choices based on data analysis, guided by monitorable KPIs. Here there are cultural barriers to overcome, even at management level.

Third pillar

The concept of **integration** in very important. Working in a layered environment that grows year after year, it is very important that every piece of this digital ecosystem is connected.

And here we enter a tricky area. In a large organization there are projects that can arise in certain areas of independence and autonomy, disconnected from other systems and in some ways dangerous in terms of efficiency.

It is important to keep these considerations in mind when preparing requirements documents even before the project brief.

The key word here is **sharing**. The relevant departments (in our specific case IT, Web and Digital Marketing) must be involved from the beginning so that the projects can be steered in the right direction.

In this sense, we have worked and are working to equip the Foundation with integrated digital and technological tools, capable of promoting economic growth through the recruitment and retention of members and visitors.

At this point I would like to present our **digital ecosystem.** A very simple outline, just to give an idea of the complexity.

The heart of our structure, which is technological rather than digital, is the Oracle database that collects all the information about users, FAI places and the events that we organize in these places.

All the other elements are connected, directly or indirectly, to the central database, and this allows us to establish a **customized** relationship - and I stress the word customized - with the users, who are obviously the main asset of our activity.

How do we get in touch with our audience? There are many **touchpoints**.

The main showcase is the **website**.

The website gathers all the Foundation's information and produces daily content to update and engage the target audience.

I have used the term 'showcase', but improperly... in fact the website is a living, dynamic entity, a real marketing tool that allows us to tailor the publication of content to the type of audience we want to interact with.

Through an integration layer, the site communicates in real time with the database.

Some numbers related to the website: around 6 million unique users a year (and growing), tens of thousands of memberships and hundreds of thousands of tickets purchased online.

Clearly there are many other important points of contact.

We have **social network profiles** on Facebook, Instagram, Twitter, LinkedIn and Youtube. We have around one million followers and the editorial planning is very tight with dozens of daily posts.

In addition to the central profiles, we also have social pages for each of our properties (over 50), always coordinated by the headquarters but also for each delegation of volunteers (around 200).

Then there is **advertising**, which is very important in our strategy.

In recent years, we have significantly increased our investment in advertising channels, starting with social media (Facebook and Instagram), then display (Adroll and Google Display) and finally search engine marketing activities on Google AdWords.

Very important is the Google Grants program: for 6 years now we have been able to access a monthly budget to spend on search marketing activities. There are a lot of constraints and limitations compared to the traditional paid Google AdWords but the impact on our campaigns is very high.

By now, every campaign we run has a dedicated adv section.

Depending on the target of the campaign, we decide the right channel and the right audience.

Another important element in our digital engagement strategy is **CRM** (we currently manage around one million customer records).

Customer Relationship Management is the platform that allows us to send the right message, at the right time, to the right user. A message that should be as personalized as possible! These messages are mainly delivered by email and SMS.

The CRM platform, Salesforce, is synchronized in real time with the central database with a dedicated layer, a system integrator.

In practice, we send out communications every day, selecting and profiling our target audience avoiding too much contact pressure and intrusion. The planning concept is decisive.

We don't just have massive campaigns, a large part of our activity is now automated. We therefore introduce the concept of **Marketing Automation** which will guide the evolution of our CRM over the next three years.

We also have other contact points to be developed, such as **virtual assistants** and **integrated ticketing**.
Today our customer care tools are still very traditional: email and telephone. We want to open up to the new world of chatbots and Whatsapp and find new channels of dialogue to provide an even better service to users.

On the ticketing side we already have an active online section but we are working to complete an integrated platform between online and onsite ticketing.

The integration of this information with database and CRM will obviously open up very interesting new user relationship scenarios. Ticket purchasers and therefore visitors to our properties are in fact the "hottest" target group with we can get in touch.

This synergy between the digital world and the physical world, the so-called **phygital**, is certainly one of the opportunities of present and future.

In this direction goes the development of a series of tools to facilitate the recording of visitor data through digital **devices**. With RiDi and Portal we are able to record the data of a visitor or the subscription of a card (including payment) using a smartphone.

Here, too, important scenarios are opening up: the acquisition of this data and the possibility of using them within digital strategies expand the chances of success of our actions in a multi-channel or even better omni-channel perspective.

Finally, we will also integrate the accounting, budgeting, purchasing and planning system (ERP).

And last but not least, the data in the database will also be used to feed the **business intelligence** platform, which is currently being designed and which we hope will help us to make the expected quantum leap, particularly in terms of the data-driven approach.

To get to this ecosystem, we had to follow a very long and challenging **digital transformation path**. We are not a startup. I like to say that we followed our own pace.

Some of these milestones have been really hard and difficult to achieve. Some of the choices turned out to be wrong and we had to change them on the spot.

In fact, we can identify 2018 as a very important turning point. With the launch of the 18-21 operational plan, we equipped the Foundation with modern and effective tools such as the CRM and an advanced website.

We are now in the consolidation phase and have the opportunity to move towards a more conscious maturity and development.

The new operational plan, 21-23, will in fact lead us to develop new areas, as yet unexplored (such as business intelligence, integrated ticketing and virtual assistants), and to strengthen those already active (especially in terms of personalization and marketing automation).

I will close by presenting a concrete **case history** which in some ways contains everything I have said before: the promotion of the census of **I Luoghi del Cuore**.

Every two years we promote this census and ask Italians to vote for their favourite place. The campaign lasts about seven months, from May to December, and is conducted through various channels, not only digital. Many of the votes are in fact collected physically as paper votes, through stands organized by volunteers and local committees.

But over the years the weight of votes collected online on the website has grown more and more.

How is the communication plan?

The launch of the census took place with a national press conference and the opening of a dedicated section on the FAI website, a section in which, by free registration, users could search for their place and vote for it (if it wasn't there, of course, they could add the place).

In addition to voting, we also give users the opportunity to upload information about the place: geographical location, photo, description... The Luoghi del Cuore database is therefore created directly by **users** and moderated by the head office.

In 20 years of census we have archived around 50,000 places.

The site offers a showcase of all these places, with a search engine and a map, and above all displays the ranking in real time and provides a whole series of engaging content (such as "Netflix"-style strips, as we call them, which present in rotation the most voted castles, the most voted villages, the most voted churches...) that can be filtered at any time by geographical criteria.

The concept of **proximity** is very important: the key to success in a campaign like this lies in being able to engage users in the places closest to them.

The campaign began, press releases were broadcast on television and in the main newspapers, and obviously the digital mobilization also began: a dedicated website with news, a social editorial plan, advertising campaigns and a newsletter plan.

Maintaining constant coverage over 7 months is impossible.

We therefore organize ourselves around communication peaks: the launch in May, the communication of interim results in July, the resumption in September and the last-minute in November.

These intervals are covered by advertising investments and newsletters.

The advertising strategy consists of several steps (all geolocalised): we work on the typical digital marketing funnel of awareness, consideration and conversion.

For the **awareness** part, we mainly use emotional videos and engage the upper part of the funnel, so we focus on prospects. The action required is to find out more information on the website.

On the **consideration** side we use banners or social posts in which we give more information and invite users to vote. The target audience in this case is retargeting of users who already know us.

Finally, we come to the **conversion** phase: here we work on retargeting lists or specific users already present in our database (for example voting users) and we propose very targeted ads to convert them in terms of votes and secondly also memberships.

Communication peaks coincide with **television** exposure. Television is still the strongest and most important media for any campaign, and with adequate synergy it is also decisive in strengthening digital strategies.

When a campaign is shown on television, we immediately register **traffic** peaks on the website. And here we must be ready first of all on the systems side: the site must be able to withstand sudden increases in traffic.

Then we have to organize the appropriate **search** campaigns on Google because it is a typical user habit to switch from TV to search engines.

On the other hand, there are channels on which promotion is **continuous** throughout the seven months of the campaign: for example, social media, ads on the Google Grants search network and personalized communications by dem on the CRM side.

Automations in this case are very complex: each vote generates a thank-you email. And this is where the **journey** starts. The voting user is engaged every week with contents based on his geographical area and his level of involvement with the FAI (the number of votes for example). Then, obviously, we distinguish the journey of users who are already registered with FAI from those who are not yet registered.

The cycle of **engagement** of users initially pushed to continue voting ends with an attempt to convert them into members.

We have done various tests on this aspect. But I must say that the response of this target, which is certainly younger than our reference target, has always been very high in terms of mobilization (and therefore of voting) but quite low in terms of fundraising.

It is difficult to convert these users.

The paradigm is always the **funnel**: in order to achieve conversions, we have to start from a large base.   We start by engaging a lot of Italians who have interests in line with the census, some of whom will interact with our tools and vote. From there we will start a relationship with the voting users to invite them to vote again and to enrich the place cards with interesting content. And a portion of the voters will do this.

Finally, we will propose membership, maybe discounted as a promotion, to these users who have shown to be motivated, and a small part of them will convert into members.

So in conclusion, the relationship with users needs content, as personalized as possible, time and patience.

I have finished, I hope I have been clear and not too boring. Thank you again! I am available for further information.

Innocastle stands for: INNOvating policy instruments for preservation, transformation and exploitation of heritage CASTLEs, manors and gardens. The partnership of INNOCASTLE consists of five European partners: the National Institute for Heritage (Romania), Ghent University College (Belgium), the Province of Badajoz (Spain), the National Trust (United Kingdom) and the Province of Gelderland (The Netherlands). For more information about Innocastle: www.interregeurope.eu/innocastle/