Define a Goal

Before you begin to build any experiences in Monetate, it's absolutely vital to your success to determine what your goals are. This may start with a high-level corporate initiative or even something a bit more granular, such as "I want to sell more blue shirts." As you begin to develop and refine your personalization program, keep a running list of those goals as they inform the direction for your Monetate program.

One of the most common things that many Monetate clients face is that executives and higher-ups in their respective organization authorize an initial investment in marketing technology (in this case, Monetate) with a specific metric or goal in mind. Identifying and defining that goal is important.

Common Goals and Associated Metrics

- **Brand awareness or reinforcement** — Increased website traffic, page views, social comments, video views, document views, or referral links.
- **Brand engagement** — Blog comments, likes, shares, tweets, pins, and inbound links.
- **Lead conversion and nurturing** — Increased email subscriptions, form completions or blog subscriptions.
- **Customer conversion** — Increased online and offline purchases.
- **Customer loyalty/retention** — Retention/renewal rates, a decrease in users who unsubscribe.
- **Customer upsell/cross-sell** — Increased sales in new/related products or accessories.

Keep in mind that everything presented in these training materials is only the baseline for the strategic approach you can take with Monetate. The Strategy and Insights team is here to help develop a personalized approach to your specific business goals. Contact your Client Success Manager (CSM) for more information.