



Is the 360-Degree View of the Customer a Myth?

How far are most businesses from being able to update their customers' profiles with immediate actionable insights?

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Data Disconnected

In this age of the empowered consumer, businesses can't afford to treat their customers like strangers. The expectation is a two-way conversation with brands, extending across multiple channels, at the customer's own convenience. The only way to keep that conversation personal is to have a 360-degree view of the customer and update it in real time.

However, according to new research published by the CMO Council, organizations are failing to keep pace with customer expectations for frictionless experiences despite the multitude of data, analytics, and engagement systems currently available to marketers.

Of 250 marketers surveyed, only 7% can deliver real-time data-driven engagements across both physical and digital touch points. Perhaps even more telling, only 5% of survey respondents experience the bottom-line impact of engagements in real time, mostly because of the manual transport of data and intelligence from disconnected systems.

We wish we could say we learned of a different scenario, posing to 10 industry leaders the question: "How far are most businesses from being able to update their customers' profiles with immediate actionable insights? What is the biggest challenge to achieving this goal?"

Our One Tough Question participants, who are immersed in bringing marketing technology to agencies and brands, agree that while a 360-degree view of the customer is the goal, few have met the objective. How do marketers get there? Read on to find some answers.

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“ CRM systems paired with the right business processes lets you effectively capture clients' journeys – from the moment they become prospects to their ongoing use of digital marketing solutions ”

Only a handful of companies have been able to successfully achieve the lofty goal of always having up-to-date client data, as it requires not only the right technology, but also cross-functional processes and a culture that puts clients first.

Get the right technology

ReachLocal uses an enterprise-grade CRM system that houses sales, support, campaign, and finance information and that captures data from multiple channels such as web forms, live chat, email, monthly calls, and direct contact.

The system paired with the right business processes lets companies effectively capture clients' journeys — from the moment they become prospects to their ongoing use of digital marketing solutions. Centralized technology is critical to attaining unified views of clients. It also enables seamless client interactions, whether clients hope to add a new service, need support, or want to pay a bill.

Establish cross-functional processes

With infrastructure in place, the next step is to implement cross-functional processes. Functional teams can no longer work in silos. For example, marketing teams can capture client reviews across the web, consolidate that data, and flag sales or

service to follow up with negative reviews. On a quarterly basis, a summary of key insights and themes from the reviews is fed back into an organization and used for product development, service, and training improvements.

Build a client-first culture

Beyond putting the right technology and processes in place, the more challenging task is building a client-first culture.

As companies engage with clients, they can capture Net Promoter Score data points into their centralized CRM systems, which enables organizations to segment satisfied clients from clients they are at risk of losing.

These insights are communicated back to employees so they can immediately see the impact a client-first approach is having on the bottom line. There is very little challenge in building excitement and motivating employees. Rather, the challenge lies in institutionalizing this mindset that our people are rallying around. Over time, with consistent words and action, the cultural mindset will shift. ■



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“When brands utilize our data to subtly connect us to products and services that might be relevant, they become almost invisible and provide a utility that goes beyond marketing. They provide relevancy, connections, discovery, and timeliness”

There is an interesting connection that remains to be made effectively between customers' online browsing habits and their real-world counterparts. While technologies on both sides exist, including systems such as Prism, which map customer behavior inside brick-and-mortar retail spaces, a large gap still exists in knowing customers as online and offline beings.

Several brands have been able to make the connection by providing branded mobile applications that are key to both online and digital as well as brick-and-mortar experiences (Apple and Nike, for instance). Additionally, some of the 3D camera technology and body- and facial-recognition software we've been working with for projects like Google's Deep City can assess body position and gaze direction to interpret customer sentiment. With additional layers of learning to process similar people's behaviors over time, brands can understand the habits of customers to make informed retail design, messaging, and visual merchandising decisions.

The bigger challenge is one of perceived invasiveness. When brands use our online behaviors to hyper-target media ads that are irrelevant, it's

something they can rarely recover from in terms of brand perception. However, when brands utilize our data to subtly connect us to products and services that might be relevant, they become almost invisible and provide a utility that goes beyond marketing. They provide relevancy, connections, discovery, and timeliness.

How many in-store experiences ask customers to share a selfie to digital displays, or tweet a comment to show up on large video monitors? The content and conversation inherent in these interactions is incredibly shallow — yet they're taking place in the most core “sanctuaries” a retail brand has, where experiences should be inspirational, human, digital, and tactile. This is what the experiential space is designed for — not frivolous, detached communication.

Ultimately, the medium is still the message. Correctly sizing the communications medium for the conversation at hand remains a key ingredient to authentic interaction with consumers. As this pertains to technological experiences, interactive mediums, and engagement, often a mismatch in what is being communicated and where brands are setting up the conversations still exists. ■



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“The majority of companies are incapable of delivering on the vision of treating customers as individuals. They have a multitude of point solutions and each has its own representation of the customer”

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We all know business success depends on knowing our customers as individuals and personalizing every interaction. Yet the majority of companies are incapable of delivering on this vision for a simple reason: They have a multitude of point solutions stitched together and each has its own representation of the customer. They don't have the ability to resolve customer identity across these systems. The consequences are significant.

For instance, we bought a SaaS expense-management solution and the implementation was such a nightmare that we gave up and canceled the contract. A few months later I got an email from its marketing team inviting me to an event as if I were a valued customer when, in reality, I had a bad taste in my mouth from my prior

experience with that company. Company representatives should have reached out to me to understand what went wrong and why I'd canceled the contract, find a way to fix it, then try to sell to me again. But data about my cancelled contract never made it to the service or marketing teams, so the marketer who sent that email had no idea that I already had a relationship with the company.

Another challenge is that most systems are built to store data, not to react to events. There is no concept of data relevance or recency and differentiating data (home address or email) from events (looked at a video or clicked on an ad). This is critical because most data is static and not actionable — it's events that are dynamic and highly actionable. ■



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“The greatest challenge and its solution is people – qualified marketing strategists collaborating with data scientists, leveraging analytics to reveal insights and solve marketing challenges”

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A real-time 360-degree view of the customer is the stated aim of many marketers, but most organizations have a long way to go before they can achieve it. They lack the data-management and governance processes to capture and integrate data from multiple channels.

Data comes in many shapes and sizes, from granular web browsing to social media sentiment to direct-mail campaign response — and everything else in between. Managing this data is difficult enough, but with the pace of innovation, data vendors, and product consolidation, this quest is becoming ever more challenging.

Some marketing departments remain siloed, with limited insight into what other functions are doing. Proper marketing attribution remains a challenge for most organizations.

The greatest challenge and its solution is people. It's having qualified marketing strategists collaborating with data scientists, leveraging analytics to reveal insights and solve marketing challenges.

For example, who are the prospects most likely to respond to my campaigns, but who are also less likely to churn? What product or service is each customer likely to buy next, and how likely are they to churn?

Marketers must pull disparate customer data together under a unique ID, bringing in external appended data as needed to provide added predictive power to their efforts. They can then automate predictive analytic solutions within their CRM platform to provide real-time insights. Predictive models baked into the database re-score the customer profile periodically, ranking for upsell and retention efforts. In addition, a customer dialogue can be facilitated via rules-based marketing, combined with marketing automation. This “if-then” approach is based on customer behavior and enables marketers to respond with communications that are closer to real time and more effective than many traditional customer calendar-based campaigns. ■



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“A brand’s ability to take immediate action based upon consumer behavior lies in the system that’s in play”

Many forward-thinking companies can update their customers’ profiles with immediate actionable insights. As consumers, we experience it every day. Here are three examples:

Insight: A consumer decides to search Amazon for bedding.

Action: Behavioral ads immediately begin appearing in web browsing. The individualized purchase consideration remains at the top of mind throughout the browsing experience.

Insight: A system identifies a consumer’s taste preference for beer.

Action: The system enables servers to make recommendations based upon that individual’s taste preferences. If you like amber ales, as demonstrated by the history of your purchases, the server is likely to offer you the newest amber ale on the menu. In this instance, the server has created an experience tailored to the individual — that’s a differentiator, especially in the brick-and-mortar restaurant space.

Insight: A brand’s loyalty member visits for the fourth time in a given time period, earning a reward.

Action: The reward is immediately and automatically placed on the account. A push message — triggered at the close of the point of sale transaction — says, “Congratulations, you’ve earned a free entrée. Use it before it expires on July 31.” The message creates an immediate sense of urgency to bring the guest back into the restaurant.

A brand’s ability to take immediate action based upon consumer behavior lies in the system that’s in play. The challenge is finding a proven software provider or building it by integrating systems and massaging them until the performance is where it needs to be to deliver the customized consumer experience. If the data-collection mechanism is directly connected to a rules engine and a communications platform that performs at the speed of “real time,” the answer is yes and the use cases are thrilling and boundless — completely to the customers’ delight. ■



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“Analytics solutions have been good at capturing and reporting aggregated behaviors to answer such questions as ‘how many?’ rather than more precise questions as ‘who?’”

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Marketers tend to provide personalized experiences that are too late or timely experiences that are not relevant. This paradox between timeliness and relevance is often a result of four things:

The customer journey is now multichannel.

It's no secret that your customers are engaging with your brand across many touch points.

There are inherent challenges with this due to the different technologies that are used to enable these different channels and the difficulty this creates in connecting the dots to create a single view of the customer.

Capturing individual visitor details requires precision and scale. Analytics solutions historically have been good at capturing and reporting aggregated behaviors that answer such questions as “how many?” rather than more precise questions as “who?”

As the volume of interactions increases, capturing discreet individual details will become harder.

Finding the gold in the vast amounts of data is time-consuming and error-prone. You could argue that having enough data is not the problem for marketers today and that marketers

actually have plenty of data. The problem has now shifted from collection to interpretation and prediction.

Delivering actionable data for remarketing without delay is technically challenging.

Let's say you have captured all the individual data you need and found that proverbial needle in the haystack that will change your business.

The next challenge is how to activate that data back into your marketing systems in a way that transforms those insights from being “interesting” to driving “action.”

So, for marketers, timeliness and relevance may at first seem to be contradictions, given all these challenges. The good news is that help is on the way. Such innovations as streaming data collection, identity graphs, big data storage and processing, predictive analytics, and real-time data activation enable marketers to orchestrate more real-time, personalized experiences across all channels. ■



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“Organizations today see the world from their point of view, their product’s current state, their lines of business, and their current level of control”

Organizations must take a holistic approach in order to update their customer profiles with immediate actionable insights. Companies today see the world from their point of view, their product’s current state, their lines of business, and their current level of control. A 360-degree view of the customer that considers the various touch points in a customer’s journey helps to break down those silos. To do this, organizations can consider the following:

Master the buyer’s full journey for a true 360-degree view of the customer. Understand all touch points that surround your customer. For example, look at a shopper’s ecosystem, which combines retailers, product manufacturers, banks, consumer-ratings providers, sales tax collectors, and social media app developers. Embrace the ecosystem and form a strategic relationship to truly understand a customer’s journey and uncover new insights.

Unleash the power of data to find opportunity. Big data is an overwhelming topic for many people, but it’s essential to bring together insights

about your customer’s experiences and to ultimately learn more about marketing opportunities. Tools exist that help bring together data and help with understanding complex relationships to aid business analysts to understand how to improve customer profiles.

Leverage strategic business relationships for co-creation. The ecosystem surrounding your customers are those in which opportunities lie for strategic co-creation to disrupt and to build a 360-degree experience. Embrace strategic relationships with purpose and intent to disrupt and create immersive experiences. For a great reference, reach for David Nour’s *Co-Create*.

Enable co-creation to drive better customer experiences. Leveraging data from a vast array of internal and external data sources — including customers, employees, business partners, and suppliers — allows organizations to co-innovate with customers in order to drive better experiences for them. This is what we call a Customer Experience Network and it allows for stronger innovation to drive better customer experiences. ■



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“In my more than 20 years of working with businesses to engage their consumers and grow their revenue, I have never heard anyone say, ‘We’re lacking data’”

It isn't good enough to have a great product, service, or brand today. Companies are struggling to stay relevant in the market, and they therefore need to focus on the customer experience. This means understanding how your customers want to engage with you, in what manner they expect that engagement to unfold, and how often. Predicting what is relevant and of interest to them — almost before they even know what they need themselves — is most important.

In my more than 20 years of working with businesses to engage with their consumers and grow their revenue, I have never heard anyone say, “We’re lacking data.” Customer data platforms can deliver on the promise of consuming, organizing, and analyzing all behavioral signals and ancillary data for a true view of the customer. However, that isn't even the challenging part. Where businesses struggle is in identifying the data points that produce insightful information that is actionable. One can have all the data in the world and a single view of the customer, but with-

out it being tied to a platform that can execute relevant, timely, and personalized engagements across all channels, it's just data.

Moving from a data-rich business to a data-enabled organization is game-changing. Another aspect of data platforms is the ability of the system to know which data is important and needs to be acted upon in real time as opposed to which data should simply be stored to be processed later in aggregate for predictive models.

Businesses that look to leverage first-party behavioral and transactional data pulled from websites, apps, and stores — combined with third-party demographics and insights — yield the most complete picture possible to drive optimized marketing experiences.

What businesses get out of doing this is not only a unified data platform, but also a fully orchestrated strategy centered on the main goals of business: adding new customers, converting them at a higher rate than previously, and extending their lifecycles. ■



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A truly successful customer profile is one that disregards channels altogether and sees customers for who they are — human beings. It's built on insights and relevancy, as opposed to shallow connections, between data sets.

Currently this is nigh on impossible for most brands, as they don't own their own data. The solution? Collecting and collating insights on their own terms and on their own platforms that will ensure lasting customer dialogues. The opportunity is not necessarily the breadth, but rather the depth of knowledge — and, as a result, the ability to notice, recognize, adapt to, and act on the micro-moments in their customers' lives that actually make a difference.

"A truly successful customer profile is one that disregards channels altogether and sees customers for who they are – human beings"

Brands must disassociate their knowledge gains from channel-specific systems that feed the data sets of others and start designing customer experiences as a wholly unified singularity achieved through connected conversations and meaningful interactions. ■



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With today's technology, the average business can already enrich customer profiles with real-time insights. Analytics platforms have gone above and beyond their initial goal of data collection. Modern mobile marketing platforms can collect vast amounts of user data and parse it into actionable insights. These platforms enable marketers to create user segments based on intricate filters.

"Many analytics solutions aren't equipped to track countless in-app events instead of surface metrics like open rates – and those that are so equipped struggle with making insights actionable"

Many analytics solutions aren't equipped to track countless in-app events instead of surface metrics like open rates — and those that are so equipped still struggle with making those insights actionable. Businesses need integrated solutions to act directly on their data, and these solutions are difficult to build. Still, as consumers continue to demand engaging and relevant content, we will see more and more mobile app teams adopt personalized approaches to marketing. ■

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