



Putting together the data puzzle.

How to unlock real-time insights
and value from your data.



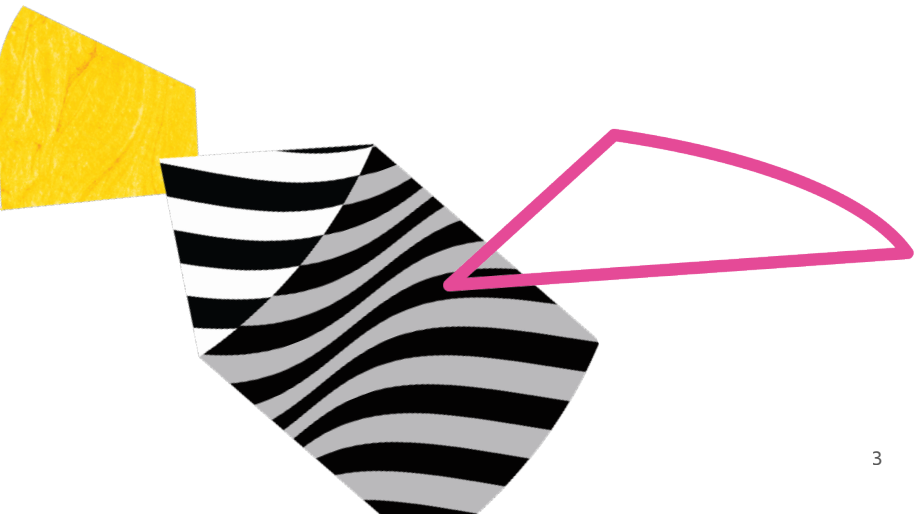
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Take a jigsaw puzzle out of the box, and you've got a ton of little pieces that fit together to create a unified picture—but you aren't sure how. One by one, you mix and match to find a fit, gaining a more holistic view of the image with each placed puzzle piece.

There is a similar “holistic” approach to becoming an experience business. We'll show you how to mix and match data to create a holistic view of your customer so that you can deliver dynamic, personalized experiences in real time wherever they're engaging with your brand. You'll learn how to implement a modern customer experience management (CXM) system and ensure it's futureproofed for a cookieless world.





The challenge of unlocking real-time insights from customer experience data.

As a marketer for a popular activewear company, Carmen has spent the past month preparing for the busiest shopping day of the year. Black Friday is finally here, but a smooth campaign rollout is interrupted by an inventory recall on hand weights, which she was planning to offer at a discount to customers who purchase yoga mats. She still wants to maximize sales with a cross-sell opportunity, so she makes an impromptu switch to resistance bands. She needs to know what color bands are selling the best—and fast.

Her company operates on a centralized SQL-based data warehouse, but no one on her marketing team knows how to run SQL. Without understanding this database language, she doesn't have access to the information she needs. So she sends a request to the IT department for them to run her query. But IT is drowning under reporting overhead. Responses to queries typically take two to eight weeks, and there's no way to get a same-day response.

This isn't a unique situation.

Many businesses are still trying to get their data to drive them forward. They have the data. They've been collecting it from web traffic and email campaigns for ages. It's in their CRM. Some data comes from the sales organization and some from the call

center. Still more comes from social media platforms and their company's app.

While these data sets may funnel into a single repository, they're measuring different indicators in different ways. Even if Carmen can see that blue resistance bands are selling the best online, this revenue metric isn't connected to other channels. Without IT running a real-time interactive query, she can't see that the black resistance bands are surpassing the blue in sales on social media marketplaces and in brick-and-mortar locations.

When data exists in silos that can't easily be stitched together or sequenced for analysis, businesses are unable to act on insights. Not everyone who needs it has access to the data or the programming skills to run SQL queries and get real-time insights. This means they also don't have the full customer journey context and can't deliver the meaningful and timely personalization that customers expect.

Data without connection holds no value. You must refine your data. Organize it. And share it with those who can directly affect the experience. It all starts with bringing together the right data—sets of data that may be separated from each other by silos like interactional, transactional, financial, operational, and third-party.

This is where CXM technology comes in.





CXM takes connection.

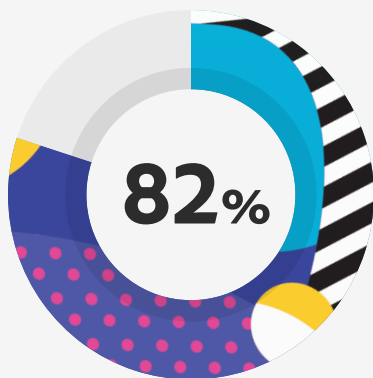
Data is only as good as its connection to your customers. With artificial intelligence (AI) and machine learning features, the right CXM tools can help you integrate your data and put the customer front and center. You'll gain a true understanding of your customer and be able to act on up-to-date insights and personalize your interactions in real time. Let's take a deeper dive into the benefits.

Get to know what makes your customer unique at every moment.

Customer expectations steer the dynamic give-and-take exchange between businesses and consumers. To meet these expectations, you'll need a comprehensive and timely understanding of your customers. You can, in effect, humanize your data by creating unified customer profiles that incorporate all known and unknown customer information, including their interactions with your brand.

You also want the ability to build unified customer profiles that update as soon as new data lands. AI and machine learning capabilities can anticipate preferences and needs based on event streaming data (such as when a customer places an order), personal data (such as a person's age or location), and segment data (such as customers versus prospects).

82% of consumers expect brands to accommodate their preferences and expectations.



Source: Gartner

Customers expect relevant, consistent messages everywhere they connect with your brand. This is no easy task, as customer needs, preferences, interests, and buying patterns are constantly changing. Businesses need to adapt to these whims in real time.

Get personal in real time, everywhere they go.

Having unified customer profiles based on real-time data is the base requirement for the most effective CXM. Being able to act on profiles in real time across channels is what turns the journey into a true experience that keeps customers engaged and coming back for more.

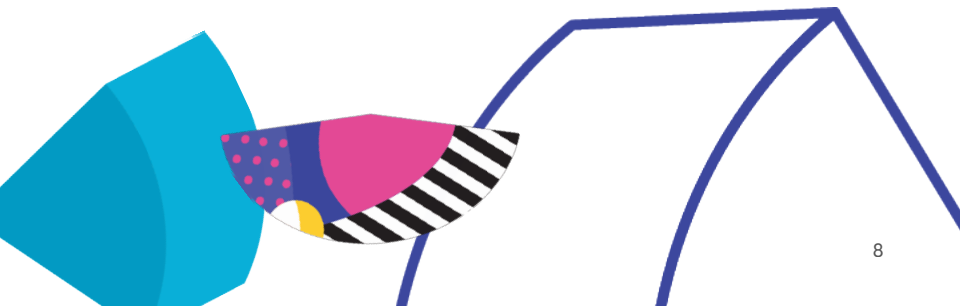
It's all about scaling personalization across multiple audiences and geographies. Your customer is everywhere at once—online, in-store, on app—hence, the term omnichannel. This can make it challenging to offer up consistent, tailored, empathetic experiences at every point of engagement.

Challenging isn't impossible. Not when you take a coordinated approach to data insights.

AI-powered analytics is the workaround to link and visualize data from all your online and offline channels and get insights across the entire customer journey in real time. With AI and machine learning running the system, you can see when the customer starts their journey online, continues their research on mobile, or jumps to the app to collect an advertised promotion. You can track their moment of purchase and know when they made a call to a call center or placed a return. And you can guide them toward the highest long-term value outcomes.

Gone are the days of the 72-hour refresh. No more getting ads for software three days after you sign up for a free trial. With the right AI-driven analytics, you can refresh customer profiles and activate them to different destinations in real time. So the customer can be treated as they are now, not as they were in the past or even two minutes ago.

When you have insight into what's happening in the moment and technology that can adjust in real time, you're able to deliver truly worthwhile experiences when and where they matter most. An AI-powered CXM system can help deepen your understanding of the customer so you can personalize experiences in real time, across all channels and at massive scale.





Building the backbone of your CXM system.

By now we can agree, it's not just about gathering all data and hoping the whole mass will create a path to amazing customer experiences. The technology you invest in must be able to effectively handle your data needs. When building the backbone of your CXM system, we suggest consolidating, standardizing, and democratizing the data.

Consolidate it.

Marketing teams are tasked with two main responsibilities: find and acquire new customers and grow and retain the existing customer base. When companies use different technologies, such as a data management platform (DMP) to track pseudonymous data and a customer data platform (CDP) to manage known customer data, the marketers' job becomes much more difficult.

But you don't need multiple technologies to manage known versus unknown data. And you don't have to buy or build a completely new system to integrate with everything else. Marketing and IT departments can reduce complexities in their tech stacks by converging technologies into a single platform with plug-and-play extensibility.

Define it.

With your data gathered in one place, you'll want to standardize it so it's using the same definitions across systems.

Once you've established consistent and clearly defined elements and attributes, you make the data available for activation across all customer touchpoints. This organized and networked approach to data encourages good customer experiences and builds relationships with customers that improve and grow in the long term.

Share it.

Everyone involved in creating the experience must have a 360-degree view of the customer. You want to democratize your data—ensuring that non-technical users have access to it without having to involve IT.

Rather than relying on a SQL query from a data store, marketers and campaign managers should be able to interactively ask questions of the data with a click of a button and get insights in the form of

| HESTA |

Meet the personalization pioneer: HESTA

The Australian superannuation fund HESTA empowers financial futures by guiding members into a more secure retirement with valuable, personalized information and services. Over the past several years they've transformed a static website, siloed data, and disjointed marketing tools into a cohesive CXM system centered around a deeper understanding of members' needs. They've increased their new member retention rate by 40 percent with a personalized welcome journey and achieved an average email open rate of up to 50 percent.

consumable, interactive views in minutes. The sharing of data needs to be intentional—baked into the budget, software, and processes of your organization.

“ By giving them more meaningful information and experiences, our members—who otherwise might find themselves unprepared—can prepare for a sound financial future.”

Georgie Obst

General Manager of Customer Loyalty, HESTA





Building a futureproof data strategy.

Once you've got the right technology in place, be prepared to adapt with a futureproof data strategy. Here are three strategies for aligning your CXM system to the market forces currently at play.

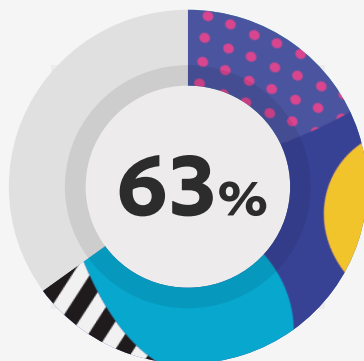
Control what you can.

We're in a digital-first world, which makes speed and agility must-have assets. The right tech can give you more control over your data and greater flexibility.

For instance, there's a huge threat to personalization looming on the horizon. Third-party cookies are disappearing. This greatly reduces the number of tracking devices that marketers use to reach and understand customers, which means customer experiences are about to get a lot less relevant.

This is an opportune moment for companies to retool their data management strategy and reduce their dependence on third-party cookies. According to an Adobe and Advanis study, only 37 percent of professionals are prepared today for a cookieless future. You can act now and solidify a solid first-party data strategy to differentiate your company from the competition.

63% of companies will experience a personalization impact due to impending market forces.



Source: Adobe and Advanis

First-party data can be hard to come by with users who are engaging with your brand for the first time. AI-powered analytics help you understand segments and behavior. You can use these segments as a seed for look-alike modeling to help find new customers who behave like some of your best customers.

For example, let's say your most loyal customers buy cosmetics and hair products over \$50 at least twice a month. You can use those parameters to find more customers like that. As you build on these segments, your personalization will improve. The greater the experience, the more you showcase a value exchange that tempts customers to give you their data willingly.

Ensure you have peace of mind with data.

New data regulations and policies make it more critical than ever to market responsibly. A solid data management strategy puts privacy and governance at the forefront with marketer-friendly controls that

confidently address regional and organizational requirements for customer data.

Data governance is the framework your organization uses to agree upon how data is used, who manages it, and who can make decisions about it. Governance also includes your business's data privacy policy. Be sure as you assemble, keep, and use customer data that you're accounting for proper privacy and legal compliance across all countries and regions where you do business.

You'll want a data management framework that supports this strategy and allows you to manage CX data across the enterprise with labeling, usage restrictions, policy creation, and enforcement. This gives marketers the flexibility to market responsibly in different regions and across different parts of their organization.



Meet the personalization pioneer: Nine Entertainment

In the wake of the pandemic, Nine launched a new product called Audience Match that brings together data sets across multiple platforms to form an in-depth view of customers built off their user identities. This means that instead of just targeting devices, brands can now match customer data to 13 million registered users through one streamlined integration to make the most of every communication—in a privacy-responsible way. With a fuller picture of customers, advertisers can find and target key audiences with personalized and relevant advertising.



Build a successful team.

Work with trusted partners that offer continued guidance and support to make sure you're getting the most from your investments. Get your stakeholders and team members on board with the technology and provide ongoing training to ensure everyone involved in the customer journey can maximize your CXM system.

It's essential to remain flexible and open to trying different approaches and bridging any skills gaps within your workforce.

“ It was important for us to make this possible in a way that was seamless for our clients to execute and provide the security that they needed.”

Ben Campbell

Director of Advertising & Data Products, Nine Entertainment



Technology must support evolving data management requirements.



Shift to Durable Identifiers

Cookie restrictions require new approaches over the next 18 months to futureproof data management.



Expectation of Personalization

Customers expect relevant and consistent messages across all marketing touchpoints.



Privacy and Governance at the Forefront

New data regulations and policies make it more critical than ever before to market responsibly.



Consolidation of Marketing Platforms

Marketing and IT departments need to reduce complexity and latencies in their tech stack.

Technology Requirements

Ability to support first-party data strategies that do not depend on cookies and device IDs

Actionable and accessible profiles that power real-time personalization use cases

User-friendly controls to confidently address regional and organizational requirements

A single extensible platform with scalable infrastructure to streamline data management and activation

Make the most of your data.

Data is the fuel for the CXM machine. When you can connect the data dots across the value chain, you can act on insights with confidence and consistently deliver dynamic personalization with AI across channels and at scale. Futureproofed data and insight technologies will help you continue to deliver delightful experiences while respecting changes in privacy and cookies.

Find out more about how you can build a world-class CXM system with strong data underpinnings.

[Learn more](#)



Sources

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