Thanks To Our Incredible Sponsors

Intro

carbonx
DATA & MARKETING

Chief Experience Officer (CXO)

salesforce

Datarati

carsales

gm
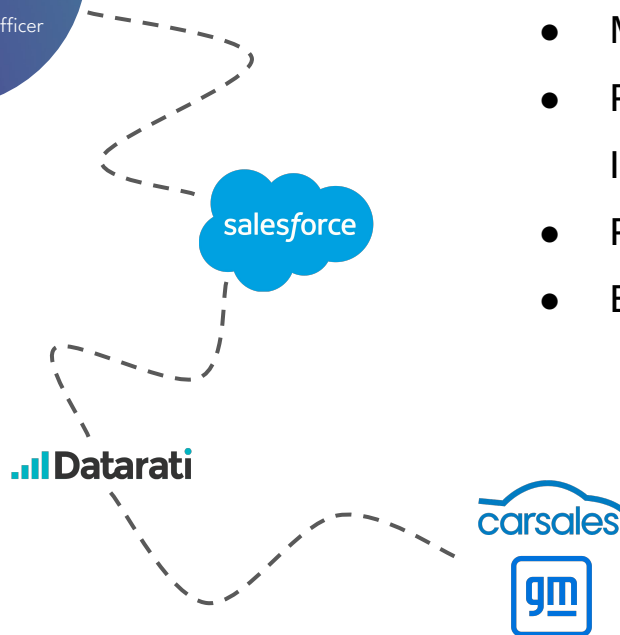
- Customer Experience Strategy
- Lifecycle Strategy
- Marketing Strategy
- Platform Selection & Implementation
- Platform Strategy
- Business ROI & Justification

Goals

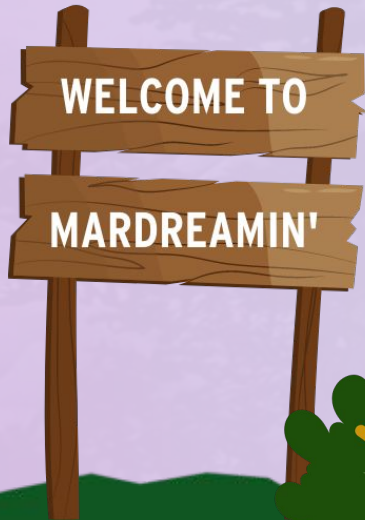How to turn a CX Strategy into a Platform Strategy

Which main platforms help in key lifecycle areas (and how) salesforce

Why an overarching strategy is so important

Where (and how) to start

Agenda

1. Start Simple & Frame the conversation

2. **The Customer Lifecycle**
   a. **Awareness** - How to drive it with Data
   b. **Interest** - Drive customers down the funnel & Capture Data
   c. **Desire** - Personalise to close to "sale"
   d. **Action** - Boom! Now what?
   e. **Loyalty** - How to keep it
   f. **Advocacy** - How to drive it

3. **Closing Thoughts**

4. **Takeaways**

5. **Questions**

WELCOME TO

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Let's Start Simple

CUSTOMER EXPERIENCE 'encompasses every aspect of a company's offering—the quality of customer care (...) but also advertising, communication, product and servicing features' - even things such as brand voice determine CX.

Customer Lifecycle (generic)

Awareness · Interest · Desire · Action · Loyalty · Advocacy

Winback

PLATFORM STRATEGY

The "gap" that lives between a Customer Experience Strategy and Customer Interactions, including the platforms use for those communications

Customer Experience Strategy

Customer Interactions

The Customer Lifecycle

Generic for simplicity

Awareness

The stage in which we need to attract completely unknown potential customers to our store / website / brand.

Top of Funnel
How to - **Attract -** Above the line advertising, keywords and Lookalike advertising.

A new company won't have the **Data** but we will come back to this later!

The main point here is to **Capture** when someone comes to our website lets say

Awareness

Awareness

At this stage we can use **Marketing Cloud Personalisation** or **Einstein Personalisation** to track people that visit our "Digital Assets" / Click through from adverts or keywords
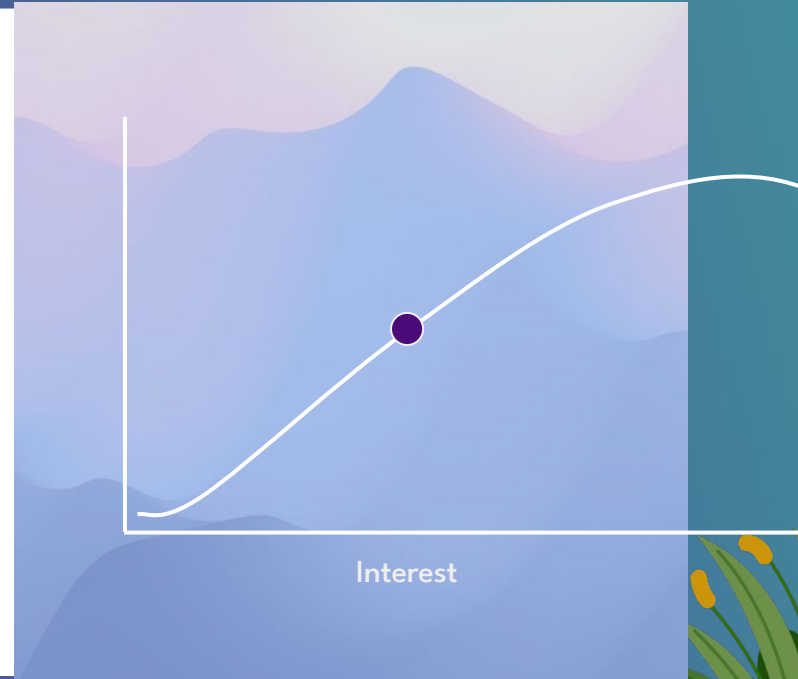
Interest

Desire

Action

Interest (drive down the funnel & data capture)

At this stage, we should know "unknown" users are visiting our digital assets.
If we are using a product like Marketing Cloud Personalisation (MCP), we can then start to personalise that website based on their browsing history.

Use cases (all from MCP) include:
- Home page personalisation
- Product personalisation
- Subscription before leaving a website
- Retargeting through advertising

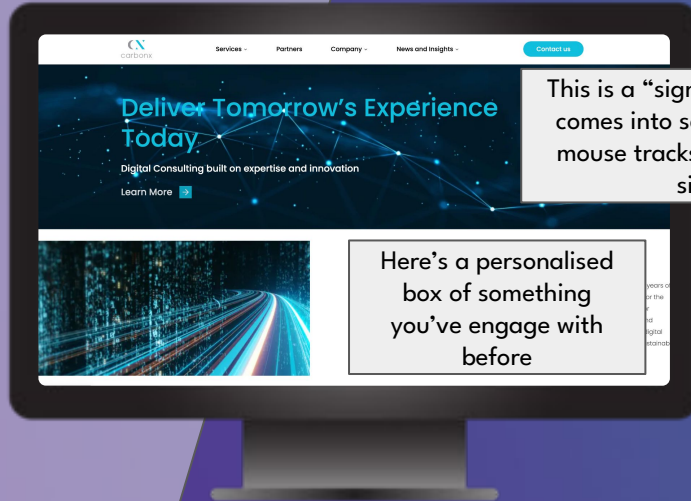The end game is Data Capture or straight to purchase (retail / ecom businesses)
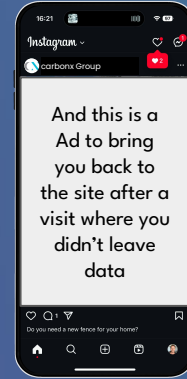
Interest

Interest

Interest

↓

Desire

And this is a Ad to bring you back to the site after a visit where you didn't leave data

Deliver Tomorrow's Experience Today

Digital Consulting built on expertise and innovation
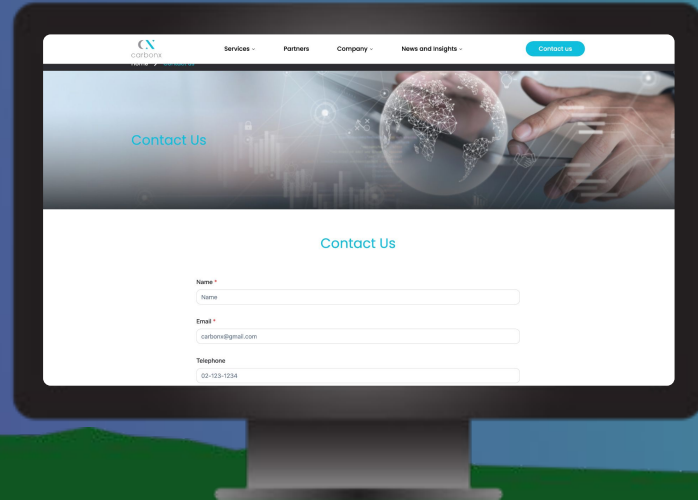
Learn More →

This is a "sign up" box that comes into screen as your mouse tracks to leave the site

Here's a personalised box of something you've engage with before

Once we have your interest, the desire is data capture or straight to purchase (retail / ecommerce)

Contact Us

Contact Us

Name *

Email *

Telephone

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Desire (personalise to close the sale)

The "Unknown" have become "Known"
Using MCP we not only have a history of digital data, but we now also have PII.

We then use both of these data sets (<u>combined</u> in either MC or Data cloud (DC)) to better personalise, and close the sale.

Use cases include:
- Continuation of web personalisation (MCP)
- Personalised emails on a known Next Best Action (MCP & Marketing Cloud Engagement (MCE))
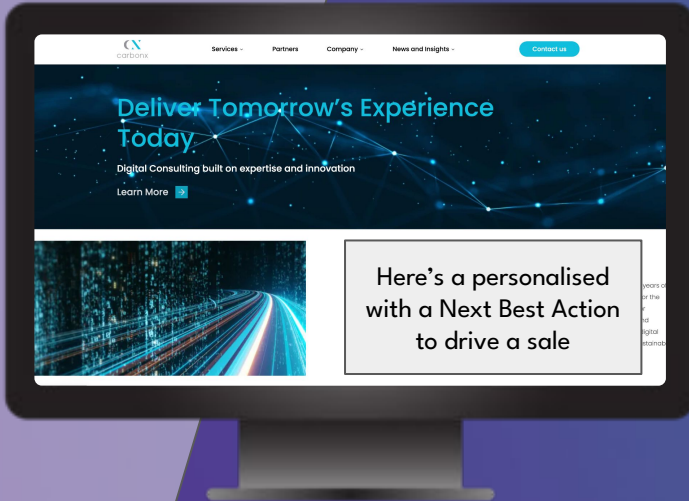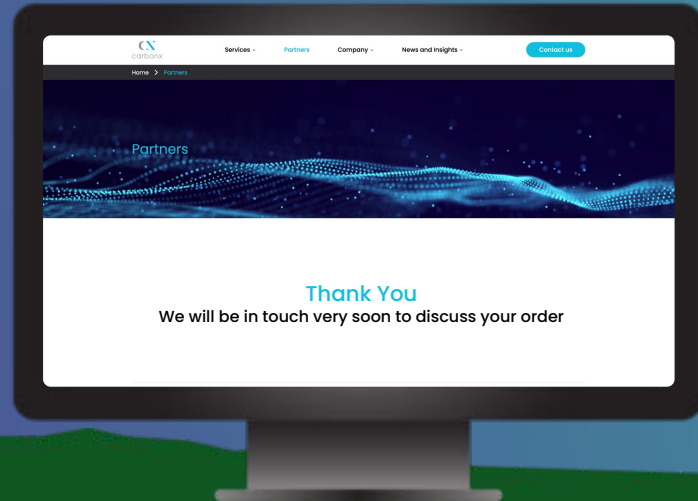- Personalised advertising

The end game is to drive a sale
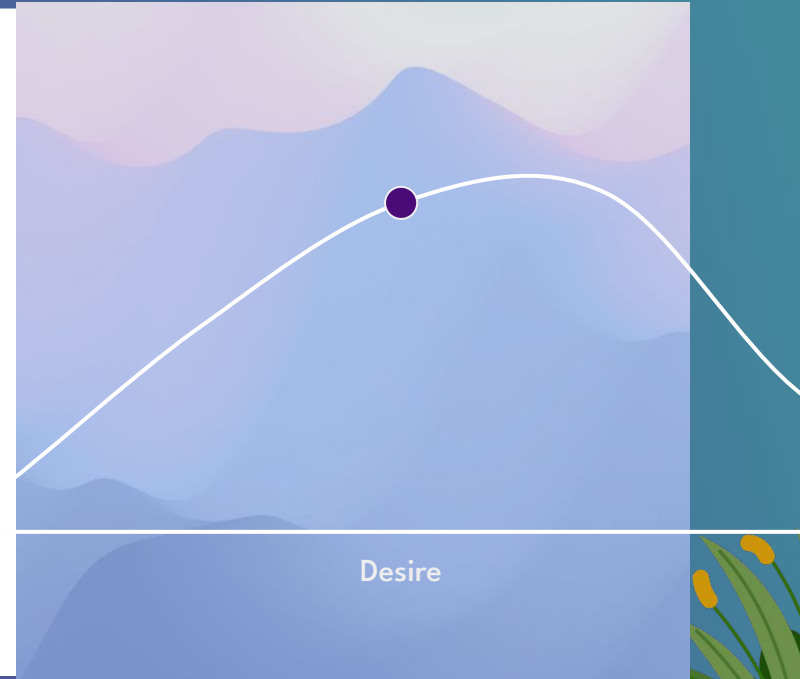
Desire

Action 💰 (now what!?)

This stage will start to fragment dependant on your business, e.g. service vs FMCG.
- When is the next purchase?
- What is the Next Best Action:
    - larger basket?
    - cross sell?
    - repeat purchase?
    - deliver on product or service

But some very important next steps could be:
- NPS or CSAT to gain feedback and improve CX (MCE) - beginning "Onboarding Journey"
    - How are you going to engage with your new customers to ensure you are driving loyalty
- Lookalike Audiences (MCE or DC)
- Suppression Audiences (MCE or DC)
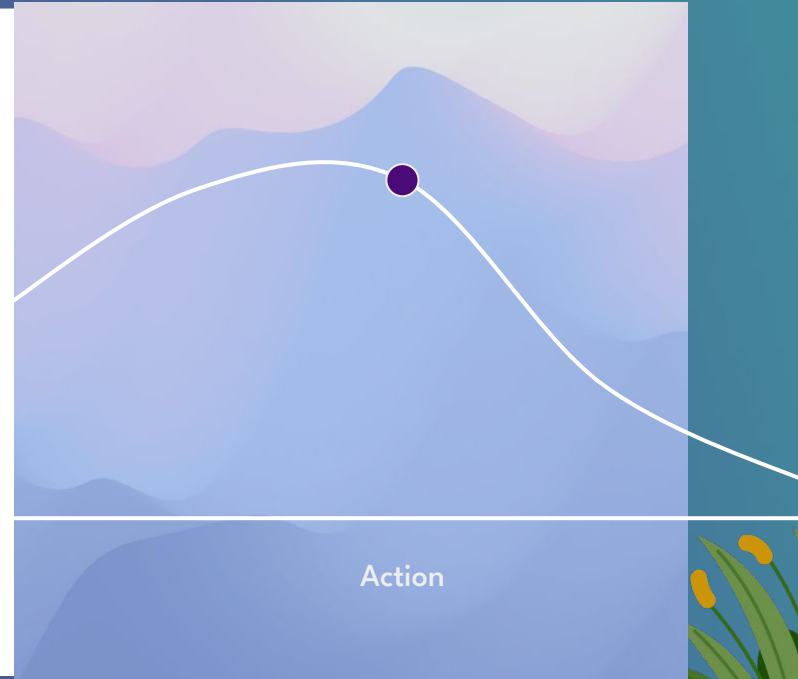
Action

Action - 1st Purchase
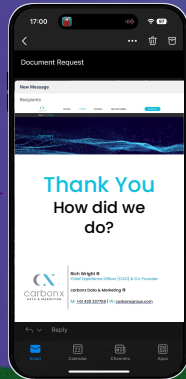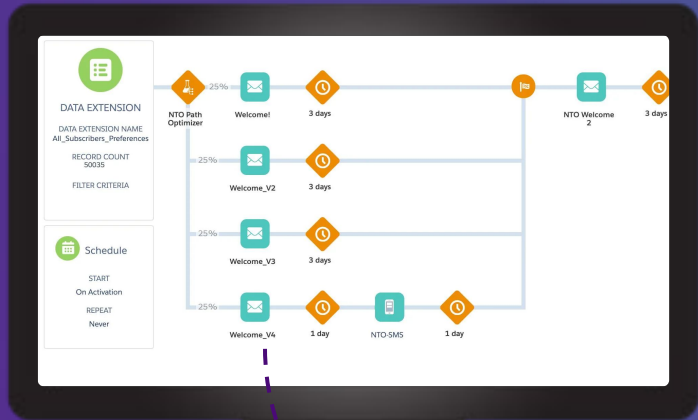
Now you have rich customer data & PII

Stop advertising to these customers, wasting media spend

Suppression Audiences

Easily attract more of the same. A more targeted Awareness Strategy
Lookalike Audiences

Important considerations around security & frequency that are eliminated by MCE / DC

Awareness

Interest

Desire

Action

Thank You
How did we do?
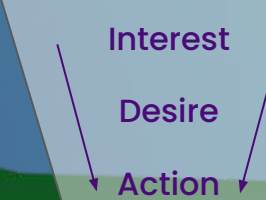
Loyalty (how do you keep it)

Again a large amount of fragmentation will occur here based on your industry / offering and buying cycle duration, however Loyalty is about a few key things that can be heavily driven by data & automation:

- Staying top of mind (without being annoying)
- Always providing a great Customer Experience
  - Easy to deal with
  - Attentive to customer needs / concerns
  - "Rewarding" Loyalty
  - Many
  - Many
  - more
- Being convenient (this could mean many different things across many offerings / industries)

Loyalty

Loyalty

How are you removing data silos to ensure each customer communication has a **complete** view of the customer

Considerations like - do repeat customers go on the same onboarding journey?
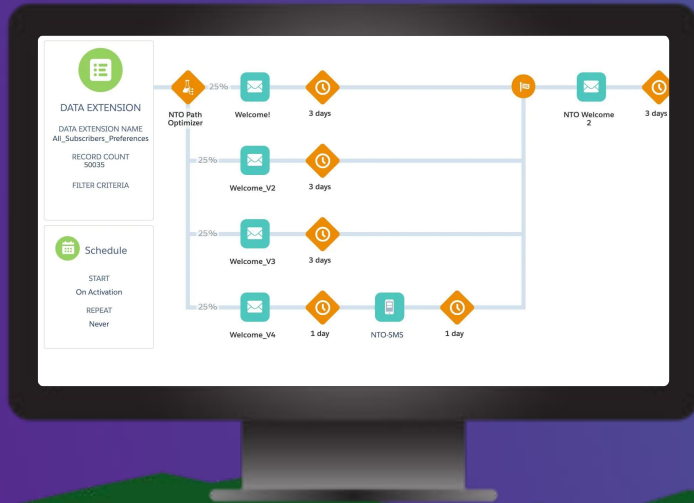
Think transaction history for banks
If we see a mortgage default in one place - could we send a debt consolidation email / new credit card offer?

Or how do we ensure customer facing staff have a complete view - being able to offering exception service as well as potential upsell / cross sell opportunities

Or if the customer was unhappy - pausing automated communications until their issue is resolved

DATA EXTENSION

DATA EXTENSION NAME
All_Subscribers_Preferences

RECORD COUNT
50035

FILTER CRITERIA

Schedule

START
On Activation

REPEAT
Never

NTO Path Optimizer

25%   Welcome!   3 days

25%   Welcome_V2   3 days

25%   Welcome_V3   3 days

25%   Welcome_V4   1 day   NTO-SMS   1 day

NTO Welcome 2   3 days

MuleSoft   Data   Sales

Heroku   Service

Canvas (Quip)   Marketing

Tableau   Commerce

Slack   Platform   Analytics

Einstein

Loyalty

Having a keen understanding of your customers, your offerings, and their buying cycles will help you to drive lifecycle communications that enhance loyalty.
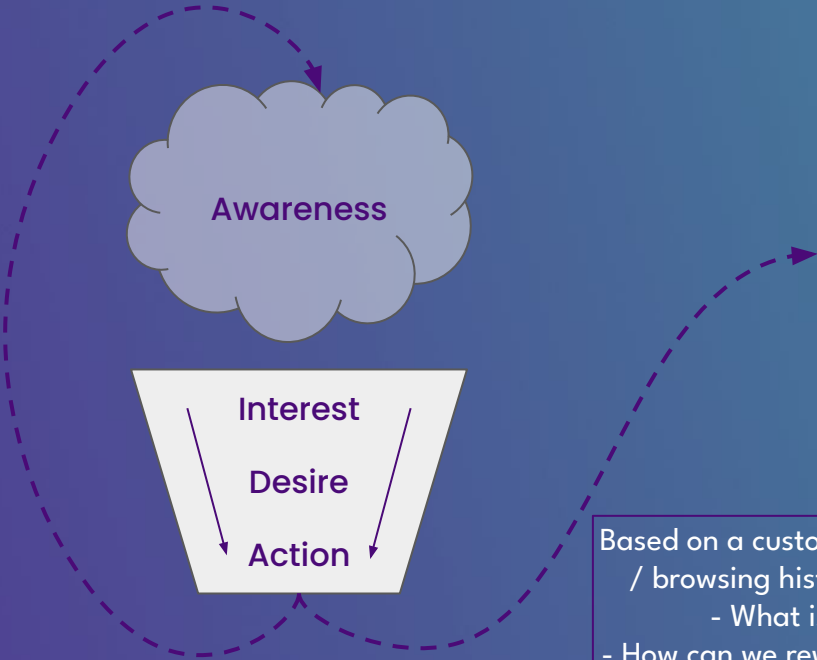
Awareness

Interest

Desire

Action

Based on a customers purchase / browsing history and PII...
- What is next?
- How can we reward customers for taking that next step with us and promote them to do so

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DATA EXTENSION

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NTO Path Optimizer

25% Welcome! 3 days

25% Welcome_V2 3 days

25% Welcome_V3 3 days

25% Welcome_V4 1 day NTO-SMS

Advocacy (how to drive it)

At this stage personalisation needs to be at its absolute peak, from logged in and publicly accessible websites, to every customer interaction - think airline rewards level personalisation.
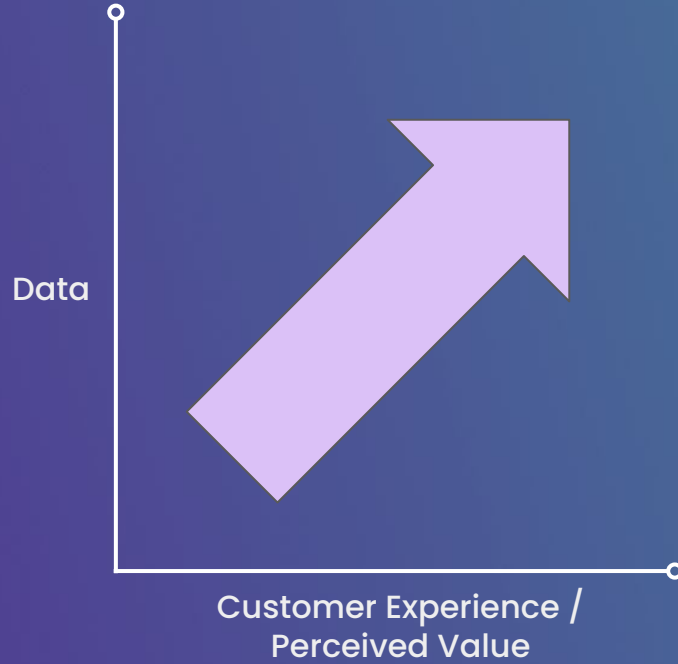
But that requires extreme levels of:
- Customer Experience Strategy
- Data Strategy
- Platform Strategy
- Personalisation / Loyalty

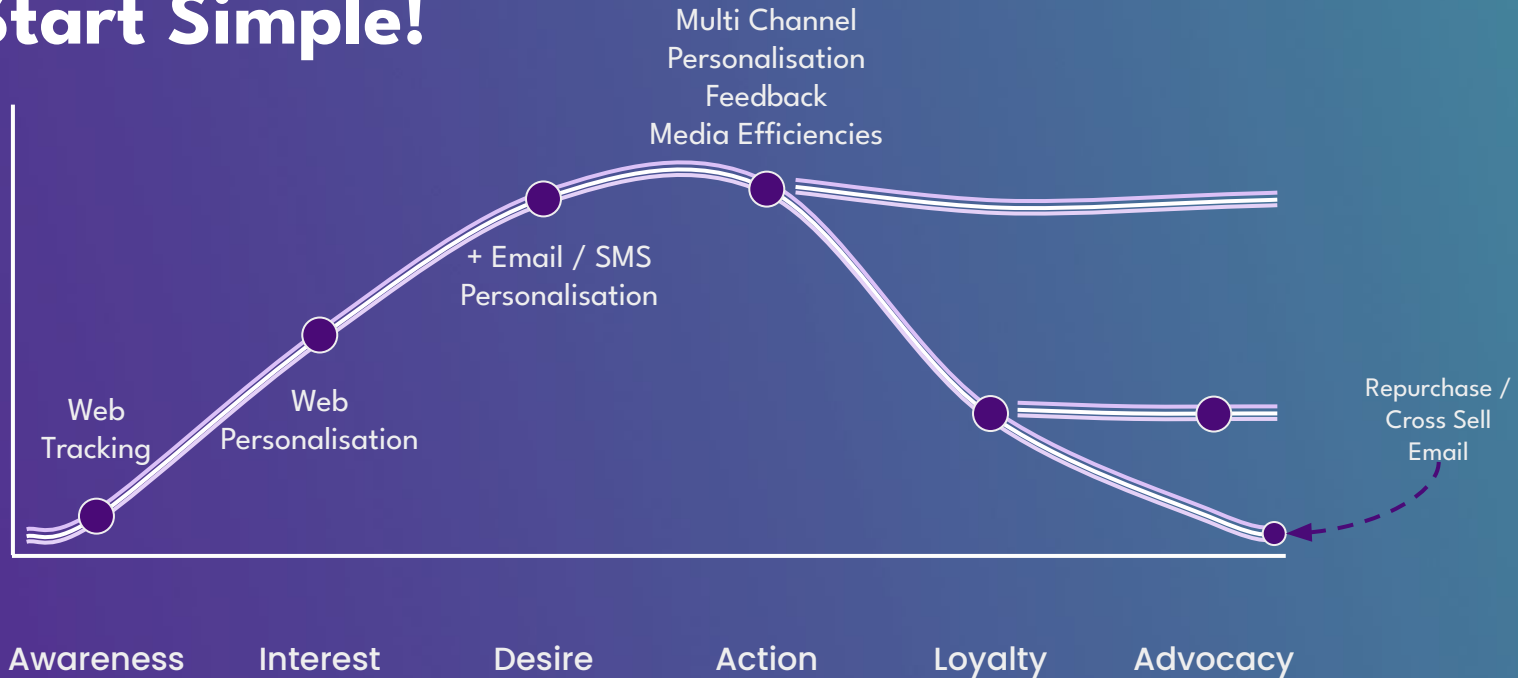Which all come from a sustainable technology stack!

#sustainablestacks

Advocacy

Advocacy - Value Exchange

Data

Customer Experience /
Perceived Value

Takeaways

1. **Have a Plan**
   Great Customer Experience & Personalisation come from a great Platform & Data Strategy - connected to an appropriate tech stack

2. **Start Broad - Not Deep**
   Have one end to end strategy for everyone, before you try and go too deep with multiple personas etc

3. **Always consider the Value Exchange**
   Don't capture unnecessary data. If you want to capture something, know how and where you will use it

4. **Analyse & Improve**
   Constantly review your data & metrics aligned to business KPIs

Questions

?

Thank You!

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