



MARTECH GUIDE

Customer data platforms and real-time interaction management

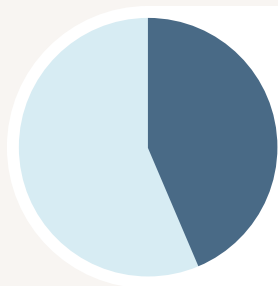
The main challenges around customer-centricity

Chief Marketing Officers today

Chief Marketing Officers (CMOs) play a crucial role in the strength of any organisation, from driving brand loyalty to increasing revenue. However, as marketing technologies evolve rapidly, keeping up with the competition becomes increasingly challenging. In fact, in the [2022 Salesforce State of Marketing report](#), CMOs said they utilise just 42% of the breadth of capabilities available in their MarTech stack overall.

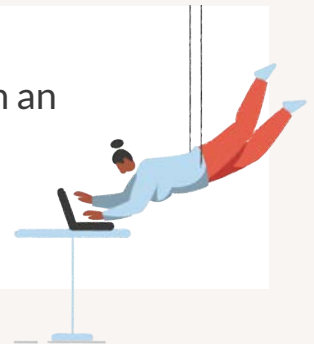
Customer-centricity is a key focus for today's CMO. Defined as understanding "customers' situations, perceptions, and expectations", CMOs need to gather and utilise more customer information than ever.

This, at a time when customers place high importance on data privacy, and governments globally respond with strict regulations. In addition, customer data the business does have can be disparate, inaccurate, and disjointed.



Only 42% of the breadth of capabilities available in an organisation's MarTech stack is currently utilised.

[2022 State of Marketing Report, Salesforce](#)



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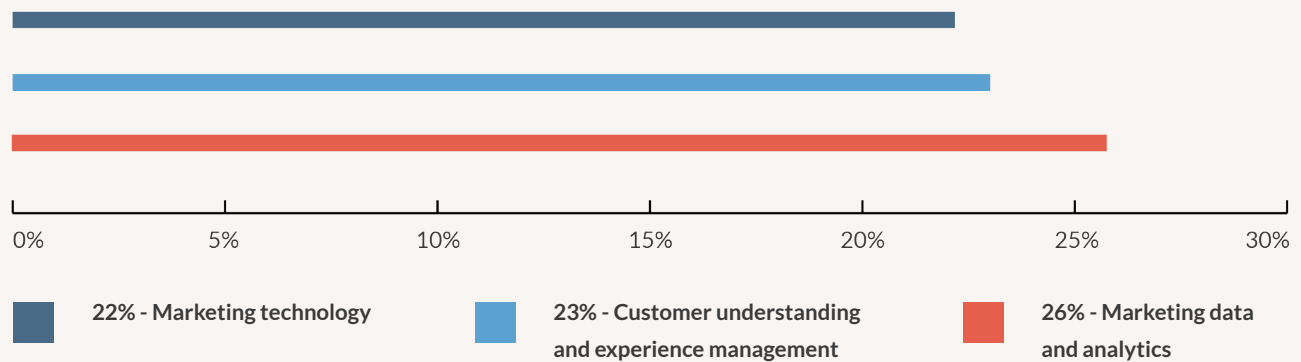
Opportunities for customer-centricity

Delivering customer-centricity with first-party data is an overwhelming challenge for marketers. But this is what the business needs in order to offer relevant and timely products, services, and experiences to their customers.

We've identified three major challenges when it comes to achieving customer-centricity. All three can be solved with the right MarTech strategy.



Chief Marketing Officer's top three capability gaps*



* State of Marketing Budget & Strategy report 2022, Gartner





Chief Marketing Officer's key challenges

1. Customer data

Marketing, sales and customer success activities occur across multiple technologies and systems. This means customers' behavioural and profile data is often held in independent, unconnected platforms – or offline. That's why [62% of business buyers](#) say it feels like they're communicating with different departments, not one company.

In order to get a single view of the customer across the business, organisations need:

- Connected data
- A way to match platform-specific IDs or unknown visitors to a known person record
- Consistent data across a customer's lifecycle

2. Customer analytics

Marketing must examine earned customer analytics to understand customer lifetime value. But often, customer analytics are restricted to one channel or platform at a time. And these platforms don't always keep up with evolving privacy regulations and customer preferences.

A third of marketers say their marketing attribution process is manual, meaning the business cannot get a real time view of the customer journey. Disjointed views lead to significant gaps between advertising, marketing, sales and customer service efforts from an analytics and operational perspective.

“ Disjointed views lead to significant gaps between advertising, marketing, sales and customer service efforts...”



3. Customer engagement

Effective utilisation of first-party data (behavioural and profile data) allows marketing to deploy meaningful and tailored customer interactions across relevant channels.

However, first-party data is limited to standard platform practices. So, for example, marketing automation tools can only capture information against the customer profile if they have allowed cookies. And CRM systems might store data that is inputted manually.

There is often no mechanism to personalise interactions in real-time without sales involvement. There is also no way to profile behavioural activities to determine the types of content the customer wants to interact with.



New goal for digital transformation

Approaching customers digitally is standard today. Most organisations have either already achieved or are on the path towards a digital customer experience.

Customers almost always expect companies they interact with to interact with them digitally. Now they want joined up, customer-centric experiences. We've identified three critical pillars to achieving this new digital transformational goal:

- Extract and transform existing owned disparate customer data into an integrated customer profile for a single (or 360) view.
- Make use of integrated customer profile data, connected customer analytics and intelligence to automate interactions; include real-time personalised experiences across owned channels.
- Connect disjointed customer analytics across business functions to drive customer intelligence; leverage data with probability models for predictive insights and targeting.



“ Customers almost always expect companies they interact with to interact with them digitally.

Building a customer profile

Two types of customer profiles and the ways to build them.

When it comes to exploring customer-centricity, there are two types of customer profile to be aware of:

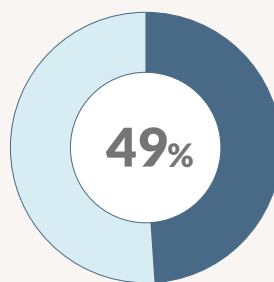
1. interaction-based:

Every interaction the customer has had with your brand

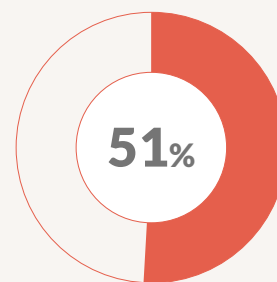
2. Data-unified:

Information from every data source to create a unified profile view

“ An affinity profile is the grouping of interaction types that then create personality traits of interest automatically.



49% of organisations are reducing internal data silos to prepare for the third-party cookie-less future.



51% are now investing into new technologies, such as Customer Data Platform to join integrated data with integrated strategies for unified experiences.

[2022 State of Marketing Report, Salesforce](#)

Customer profiling with real-time interactions

When reviewing the ability to track real-time digital interactions, marketers struggle to use meta data to create an insightful profile. Organisations frequently fail to store unknown visitor data, so therefore cannot connect a customer's activities once they become a known visitor. This impairs their ability to form a 360 interactions-based customer profile.

There are a number of marketing technologies that can help organisations to solve this challenge by creating an affinity interactions-based customer profile.

This allows organisations to track real-time interactions across owned channels such as web, email, mobile application, advertising, CRM sales and services.



“ Real-time interactions management allows your organisation to understand each customer’s wants and needs...



Building a customer profile with real-time interactions

[Salesforce Marketing Cloud Personalization](#) platform enables real-time interactions affinity profiling with the ability to match identities for anonymous visitors to known visitors. This maintains a true reflection of an interactions-based customer profile. It is enriched with:

- Existing system data (e.g. CRM, ETL)
- Feeds (e.g. API, JavaScript)

Real-time interactions management allows your organisation to understand each customer’s wants and needs, such as:

- Recognise your customers through anonymous identity matching across devices/unique IDs
- Understand business context through content and product-based interactions
- Predetermine your customer’s next move based on their true interest, affinities, and intent
- Leverage existing owned data from various sources and connectors to enrich affinity profile



Customer profiling with unified centralised data

In an ideal world, all data would be easy to connect and live in one place. However, in reality, we get the data we need for different purposes from a variety of technologies, sources, and moments. These unfortunately end up stuck in unconnected locations. In addition, each of those data sources may have different unique identifiers, which makes the process of matching data hard to achieve. And that's just the technical aspect!

We all want the ability to unify data sources and form a comprehensive view of the customer in real-time. We could then use this across the customer lifecycle and across departments or functions. A single source of truth against a golden customer record.



55% of CMOs agree they are collecting more data that they can usually interpret.

[2022 PwC CMO Survey](#)



But how is this achievable without mega amounts of technical work?

Customer Data Platforms (CDP) have emerged over the last few years as the next big wave in tackling big data with clicks rather than code. CDPs are designed to easily connect data from various sources, complete identity matching across several types of unique identifiers and finally offer a single point of truth of a customer profile.

What differentiates a CDP from a Data Management Platform (DMP)? Both ingest and enrich data, but a CDP allows for faster and simpler data segmentation. These segmentations can then be activated and accessed across other platforms to support customer lifecycle activities, including analytics.

Salesforce CDP ([Data Cloud](#)) enables these capabilities, powered with AI ([Einstein](#)) and other connected Salesforce features that excel CRM possibilities across business functions.

CDPs allow your organisation to:

- Utilise all the customer data your business collects
- Match data to a person automatically
- Act on real-time data and insights





Summary

We hope that this guide has given you a good idea of where to start on your journey to build a unified customer profile.

As a Salesforce implementation partner, we would of course recommend Salesforce Data Cloud for your CDP and Salesforce Marketing Cloud Personalization for real-time interaction management. However, we understand that every organisation is different, as are your customers.

Our experts share 40+ marketing-related Salesforce certifications between them, and they can recommend paths forward regardless of which technology you use. The most important piece of the puzzle to get right is the change management you'll need to get your business on board.

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QUICK FACTS

1999

Year established

4,000

Employees globally

96%

Repeat client rate



LOCATIONS

Australia
Germany
India
New Zealand
United Kingdom
United States



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