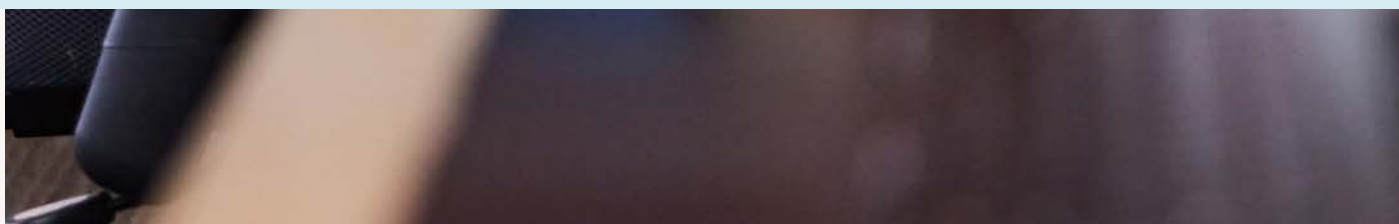# How marketing intelligence can help you create top customer experiences

Introduction

In this how-to guide, we dig into how to build marketing intelligence on your customers, and how that will help you create the best experiences for your customers.

Contents

How do you allow the data to do the work for you?

It's great that you can now easily access a single source of truth for a customer profile with centralised data. It's great that you can then use that data across different technologies and channels. In fact, it's not just great – it's the marketing dream!

But then what?

- How do you take advantage of that data infrastructure and take your customer-centric efforts to the next level?
- How do you reduce the guess work?
- How do you allow the data to do the work for you?

Right now, you always need a person with expertise in the field to determine actionable insights. You need to use the same person every time for the same task. It would be better if you could just use them once and then set a process in motion to automatically determine the next action.

Also, with very large volumes of data, it becomes impossible to manually sift through each individual record to determine individual-level actionable insights.

Finally, what worked yesterday may not work today, so how do we determine what actions will work for tomorrow?

There are two ways you can use customer data for customer intelligence:

1. Have a range of collected unified data and create an algorithm to form calculative insights.

2. Unify intelligence into a visual analytics view to monitor, evaluate, and integrate data for actionable insights.

In this how-to guide, we explore both of these methods in more detail. This will help you understand how you can build marketing intelligence to create superior customer experiences.

79% of high performing marketers can now report in real-time (excluding marketing attribution), giving them the advantage…

2022 State of Marketing Report, Salesforce
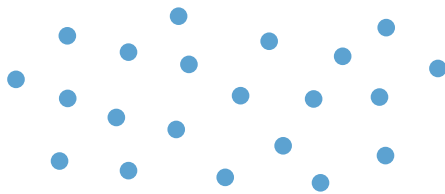
Propensity modeling

Forecast customer behaviour

Propensity modelling helps you forecast the behaviours of your customer based on their activity history.

It allows you to insert intelligence into every business process, transforming your organisation into a data-driven, customer-centric operation. Salesforce has introduced an Artificial Intelligence (AI) data discovery platform, which optimises automated actionable insights with machine learning (ML) in real-time.
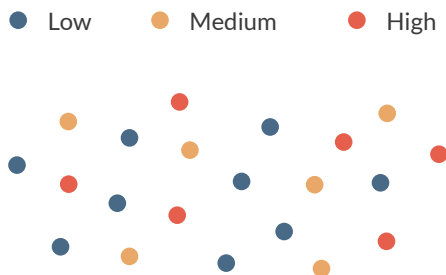
Before propensity modeling

After propensity modeling

Target prospects' likelihood to respond

● Low   ● Medium   ● High

Salesforce Einstein Discovery allows you to create propensity models without the use of code, opening creation up to a broader set of business users.

Here is a sample of metrics and activities you can impact using propensity modelling within your organisation:

- Inactiveness & churn
- Cross-sell & up-sell
- Gamification
- Engagement
- Onboarding
- Time to convert
- Customer Lifetime Value
- Unsubscribes
- Customer Satisfaction Scores

Unified marketing analytics data

How to build a full spec marketing analytics solution

Marketing analytics data can be gathered in spreadsheets, but this process is manual, open to human error and not scalable with big data. It involves manually pulling data from individual sources, often without campaign or spend connected.

A full spec marketing analytics solution can be built on top of your existing Business Intelligence platform.

This requires:

- Emphasis on technical skills e.g., IT, SQL, coding

- Focus on visualisation rather than on how to connect and unify marketing data with emerging technologies

- Manual build, which is slow to deploy and dependent on IT resources to implement and maintain

With the points above, there is no creative space for a marketer to create reports, visual dashboards and see insights in real-time without dependence on a technical resource and a backlog of 'waiting' for changes to be applied.

In the fast expanding digital marketing and advertising space, new emerging technologies are always going to be a talking point and potentially the next important thing marketing needs to adopt. But integrating these into an intelligence analytics platform and unifying them across existing marketing channels is difficult.

Challenges with this include:

- High number of raw data sources across different marketing channels/technologies
- Frequent changing of data sources and values
- Major integrations needed for each marketing channel/technology
- Marketing teams often do not have a data analyst as a resource within their team

> **" 58% of marketers state that they have added a marketing analytics and attribution platform as a major MarTech tool to their organisation in the last 12 months.**
>
> MarTech Alliance

A solution to modernise

Optimise and plan with the right intelligence

Marketers now work in an environment where active campaigns require 24/7 real-time insights and monitoring. Marketing no longer has time to wait for IT to approve its requests.

Marketing teams with an advertising budget greater than six figures often require this level of insight but are stuck with system-centric reporting.

They need intelligence to unify channels and technologies.

They need to access analyst-centric discovery and visualisation insights for optimisation and planning.

Salesforce has invested significantly into their platform, Marketing Cloud Intelligence, which tackles these challenges with ease. It enables those marketing teams with high integration needs and advertising expenditure to unify their data without the need for a data analyst or IT resource to intervene.

Marketing Cloud Intelligence has over 150 technologies/channels available to connect with predefined data sets. It has reports within its Marketplace, which is a constantly expanding ecosystem of curated apps created by partners, developers, and clients. Teams across the entire business can unify their insights with Marketing Cloud Intelligence.

Customer experiences with real-time personalisation

Creating both offline and online customer experiences is the pinnacle goal for every organisation. Post-Covid behavioural changes have driven online personalised experiences to become the standard.

Executing integrated personalised customer experiences across offline and online touchpoints is no easy task. The benefits are obvious but starting this process seems daunting.

So where do you start?

Trust comes from being treated thoughtfully, not lost in an anonymous system. Interactions that feel impersonal — like receiving irrelevant offers or waiting on hold — run the risk of alienating customers and damaging hard-won relationships.

— **62**% of customers feel an emotional connection to the brands they buy from most.

— **83**% of customers say they're more loyal to companies that provide consistency across departments.

— **96**% of customers say excellent customer service builds trust.

State of the Connected Customer: 5th Edition, 2022, Salesforce

Executing personalised experiences across offline and online touchpoints requires you to capture real-time interactions – a subject we covered in our previous guide. This allows you to capture every unknown and known visitor touchpoint with your brand, and stitch the data into a unified profile. This is known as affinity profiling. This lets you enrich record data with offline and digitally generated data in real-time.

Another aspect of delivering personalised customer experiences is using AI-driven optimisation targeting. This improves campaign targeting in a live state without a human needing to intervene.

Real-time content personalisation automatically serves up the best content for the customer based on contextual relevant interest, generated via affinity profiling. So you can recommend products and content across different channels wherever your customer is at that point in time.

Salesforce Marketing Cloud Personalization enables integrated customer experiences across digital and offline activities.

Here's an example from the retail sector of how Marketing Cloud Personalization can power a customer journey:

1. Unknown visitor engages with your product-based website and Marketing Cloud Personalization gives them a unique cookie ID.

2. As the unknown visitor browses the site, Marketing Cloud Personalization collects affinities on that engagement i.e. keywords, categories, type.

3. In real-time it dynamically changes website content to align to the affinities collected on the unknown visitor.

4. Unknown visitor registers for an account to download your mobile application, becoming a known visitor.

5. Past unknown visitor data is updated against the known visitor using Marketing Cloud Personalization's unique cookie ID.

6. Known visitor drops off from your website.

7. Marketing Cloud Personalization sends them an email with dynamically populated recommended content tailored to their interests.

8. Known visitor walks near brand's retail store and receives an in-app beacon message about an offer for the product that interested them online.

9. Known visitor purchases the item from Point of Sales (POS) in-store, scanning their in-app member name to take advantage of the special offer promoted to them. They become a customer.

10. POS data is fed back into Marketing Cloud Personalization and links back to the customer's affinity profile record.

11. Marketing Cloud Personalization sends an email thanking the customer for the purchase and asks them to complete a customer satisfaction form. Their completed form links back to their affinity profile record.

12. The customer calls the customer service team to make an enquiry, which is recorded and tracked in Salesforce.

13. The customer service team member looks at the Marketing Cloud Personalization promotional recommendations that have been auto-generated based on affinity profiling. This allows them to suggest further relevant information to the customer.

14. The customer returns to the website and their experience is automatically adapted (including chat function), displaying products that meet their specific needs and interests, increasing likelihood to buy again.

Scaling customer experiences with artificial intelligence

Building customer experience and applying personalisation at nearly every touchpoint is unrealistic for a marketing team to do alone. The level of effort for 1:1 tailoring is too time consuming to deliver sustainably.

Finding a platform that already encompasses Artificial Intelligence (AI) and Machine Learning (ML) is the most effective way to uplift personalised customer experience at scale. In Salesforce's State of Marketing 8th Edition, they identify a surge in using AI to bridge online and offline experiences between 2021 and 2022.

60%

of customers would better trust AI if they had more control over how it's used.

84%

of customers say AI can be a force for good or bad, depending on how it's used.

68%

of marketers say they have a fully defined AI strategy to help scale efforts.

State of the Connected Customer: 5th Edition, 2022, Salesforce

> **While more customers are online than ever, 43% of customers still say they prefer non-digital channels.**
>
> State of Marketing: 8th Edition, 2022, Salesforce

Choosing the right product

We've compiled a summary to show how you can already apply AI/ML to your marketing with Salesforce's Marketing Cloud suite of products.

AI-Scalable Area	Scalable Benefit	Product Suite	Feature
Automate customer interactions	Uplifting brand top-of-mind and engagement preferences	Marketing Cloud Engage	Einstein Send Time Optimization
		Marketing Cloud Account Engagement	Einstein Engagement Frequency
Automate data integrations	Reduction of data scientists dependency Quicker response times	Marketing Cloud Intelligence	AI-Powered Data Integrations
Personalise customer journey across channels	Shortening sales lifecycle	Marketing Cloud Engage	Einstein Web/Email Recommendations Einstein Content Selection
		Marketing Cloud Personalization	Einstein Recipes and Decisions
Process automation (e.g. reporting)	Operational effectiveness and increasing visibility across functions	Marketing Cloud Engage	Einstein Messaging Insights Einstein Copy Insights
		Marketing Cloud Intelligence	AI-Assisted Marketing Insights
		Marketing Cloud Account Engagement	Einstein Campaign Insights Einstein Attribution

AI-Scalable Area	Scalable Benefit	Product Suite	Feature
Resolve customer identity	Reduction of operational duplication efforts Operating from a central unified record	Marketing Cloud CDP Marketing Cloud Personalization	Identity Matching
Bridge online and offline experiences	Strengthening experientials and personalised CX	Marketing Cloud Personalization Marketing Cloud CDP	Einstein Recipes and Decisions Identity Matching
Drive best offers in real-time	Increase meaningful interactions Drive revenue	Marketing Cloud Personalization	Einstein Recipes and Decisions
Predictive customer / prospect behaviour	Proactively reduce churn Increase CLV	Marketing Cloud Personalization CRM Analytics Einstein	Einstein Recipes and Decisions CRM Analytics Einstein Discovery
Improve customer segmentation	Speed up time from criteria forming to customer targeting	Marketing Cloud Engage Marketing Cloud Account Engagement	Einstein Engagement Scoring Einstein Lead Scoring Einstein Behaviour Scoring Einstein Key-account Identification

Building real-time personalised customer experiences

Still unsure whether to invest in a loyalty management programme?

If you're looking to focus on personalising your communications, web and email experiences to your customer, you can do that with a personalisation tool, such as Salesforce Marketing Cloud Personalization.

If on top of this you'd like to create promotional offers with your partners, manage rewards, redemptions, and vouchers, and manage the process of creating customer advocacies in one place, you'll need a tool like Salesforce Loyalty Management.

Four key questions to ask your business

Ultimately the decisions you make around technology come down to your business needs. Your decisions should be made in partnership with your business stakeholders and external expert advice. To get this discussion started, we've provided four key questions:

1. Do you need to forecast customer behaviour based on their activity history?

2. Do you deal with big data when it comes to your customers?

3. Do multiple departments need access to your customer insights?

4. Do you need to report on marketing campaigns in real-time?

If the answer is "yes" to one or more of these questions, but you're unable to execute on any of the points, it's time for your business to re-consider its MarTech strategy.

Summary

We hope that this white paper has given you a good idea of where to start on your journey of building marketing intelligence to create superior customer experiences.

Implementing effective change management strategies is crucial for successfully integrating marketing intelligence into your business operations. While the technical aspects and certifications are important, ensuring that your organisation embraces and adapts to these changes is key to achieving superior customer experiences. 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.

And if you'd like any support with any of this, contact me, Saniul Ali, the author of this how-to guide and Credera's MarTech Principle Consultant.
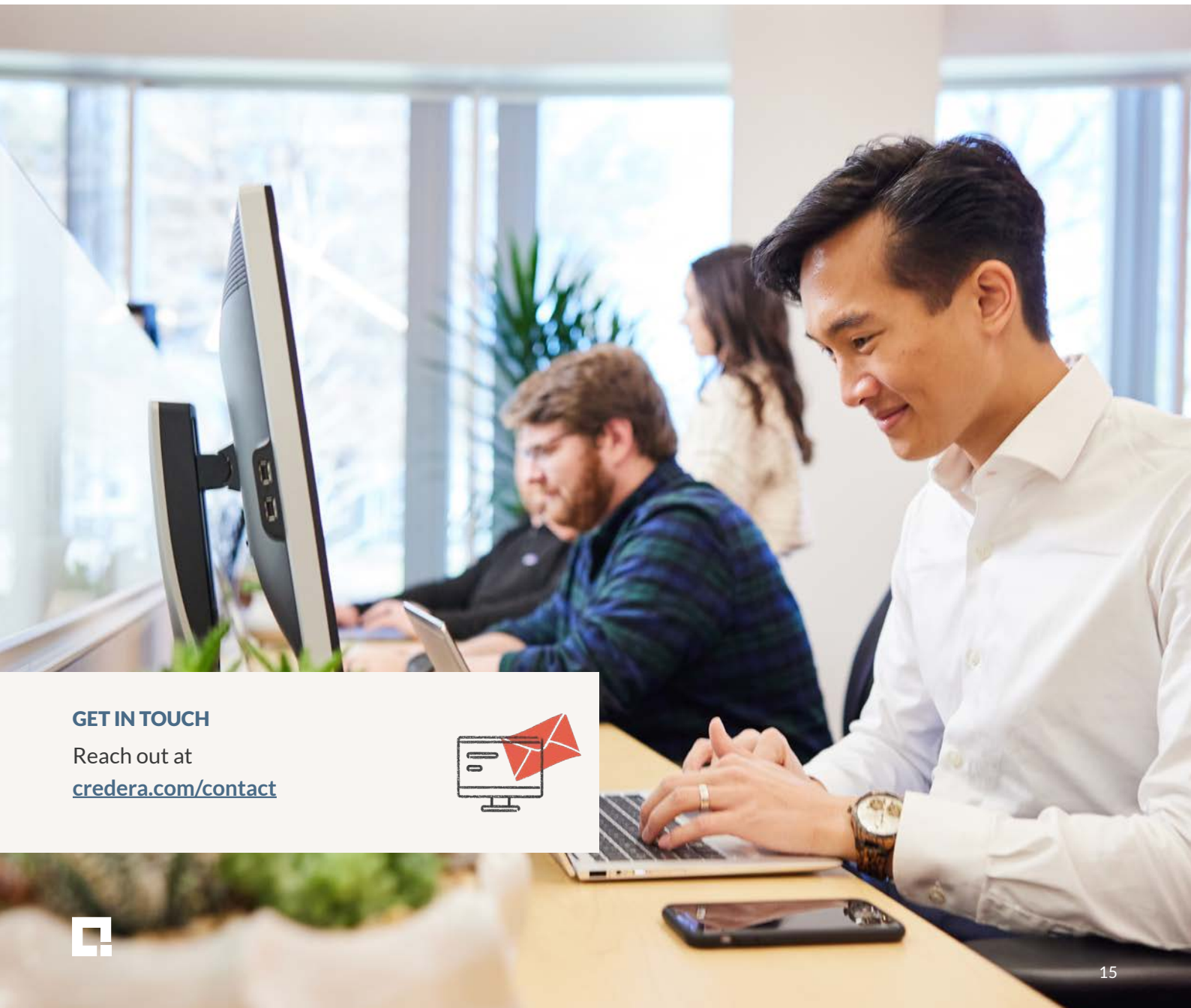
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QUICK FACTS

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Year established

4,000
Employees globally

96%
Repeat client rate

LOCATIONS

Australia
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India
New Zealand
United Kingdom
United States

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