



YOU, YOUR CDP AND DECISIONING

FOUR STEPS TO 1:1 CUSTOMER INTERACTIONS

A QUICKFIRE GUIDE TO SUPERCHARGING
YOUR PERSONALISATION

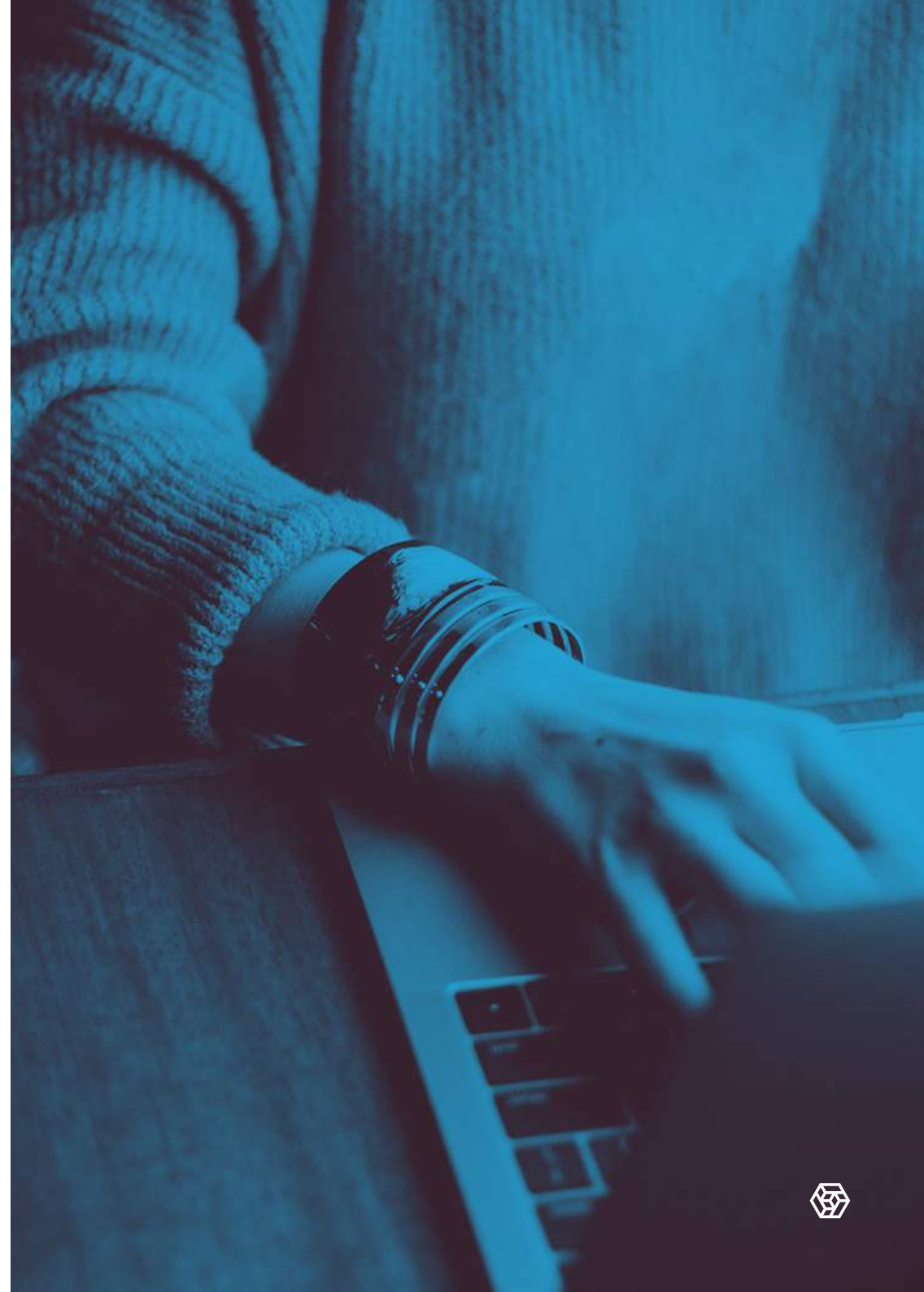
HOW TO:

01. UNDERSTAND WHERE A CDP FITS IN YOUR STACK

02. GET STRATEGIC ABOUT PERSONALISATION

03. TAKE THE RIGHT APPROACH TO CUSTOMER DATA

04. MASTER - AND CENTRALISE - DECISIONING



SO, YOU'VE GOT YOURSELF A CDP. BUT WHAT'S NEXT?

The **Customer Data Platform (CDP)** has become a “must have”. It has taken the power of customer data to new levels and become the darling of the martech industry along the way. But there's a problem: most organisations are yet to see their CDP deliver leaps forward in customer experience.

Just what is it that's preventing them from truly activating their data and unleashing smarter interactions? Why do so many CDPs have the handbrake on?

In December 2018 we hosted a webinar featuring four of the industry's best minds to discuss just that. In the face of seemingly endless siloes, the lack of “enlightened” CX strategy and an “it's not broken, so don't fix it” mentality, we asked them to explore how businesses can use their CDP to deliver standout 1:1 omnichannel customer interactions.

They came up with four critical steps to take.

WEBINAR HOSTS

Dave O'Flanagan
CEO and Founder
Boxever

Paul Murrell
Director of Partnerships
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David Raab
CEO and Founder
CDP Institute

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Editor-in-Chief
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01. BRING IT ALL TOGETHER UNDERSTAND AND DEVELOP YOUR STACK

While most large businesses now have a CDP, a deeper look reveals there's often a long way to go before they have their houses in order.

"The state of the stack isn't great", says David Raab. "Half of all companies have fragmented systems that don't talk to each other". Result? Inconsistent interactions that can't jump from channel to channel. Competing strategy and campaigns between departments. A lost opportunity to maximise the value of every interaction. And overwhelming complexity.

The path to smarter, joined-up 1:1 interactions begins with centralising data and decisioning. Things to do:

- Assess your existing tech stack. Are your tools, data and models aligned? Can you easily access your data to inform decisioning models? Is there any duplication in siloed models, and do they counteract each other?
- Define a current and future state of your marketing stack, being clear about what each component needs to deliver to move forward.
- Make your CDP the go-to place for all contextual business intelligence and data from all sources: customer business and operational. Use it to drive consistent actions across all engagement systems in all channels.
- Centralise, centralise, centralise. Centralising decisioning is just as important as centralising data. Don't do it, and scaling personalisation will be painful, expensive and less effective.

"When it comes to the average stack, there's substantial room for improvement. This is massively impacting marketing outcomes."

David Raab
CEO - CDP Institute



02. GET STRATEGIC PUT THE CDP AT THE HEART OF A STRATEGIC CX DRIVE

CX leaders become leaders by having a strategy that is both long-term and links their whole business together. “You’d be surprised how many companies struggle to think holistically”, says Dave O’Flanagan. “You need to start with what the actual goal of your personalisation is, and work from there”.

Getting more strategic about personalisation means putting the CDP at the heart of new ways of thinking. Things to do:

- Develop a high-level CX master plan that outlines what you want personalisation to achieve for the business. Make sure it aligns to your business strategy and is actionable by all parts of your organisation.
- Build a cross-functional team with overarching responsibility for delivering it.
- Track performance against the plan, adapting and optimising as you go. Use your CDP as the central place where intelligence is gathered and campaigns are measured and tested.
- Embrace new skills. Teams of the future will need to be able to interpret data and build models that underpin personalisation. Build hybrid marketing teams that combine creative smarts with a grounding in data, analytics and data science.
- Make sure your martech platforms are designed for all business users and encourage collaboration. Overcoming institutional siloes and delivering joined-up experiences across channels means not leaving anyone behind.

“Successful personalisation relies on long-term approaches that link the whole business together.”

Dave O’Flanagan
CEO - Boxever



03. TAKE A TOP-DOWN APPROACH TO DATA STAY FOCUSED ON YOUR DESIRED OUTCOME

While everything starts with data, having lots of it doesn't mean you'll get a great outcome. In reality, a huge amount of the data businesses have is currently going unused.

"Building a customer view should be a means, not an end", says Paul Murrell. "It's not about having lots of data, but having a sound data collection strategy. Understand what data will have the most impact on CX, and find it".

Taking a top-down, agile approach to data will help your business pursue its CX strategy effectively and efficiently. Things to do:

- Start with the customer experience or business outcome you want to deliver and define the use cases that will deliver it. Only then should you attempt to find the data you'll need.
- Make sure your thinking is unbiased by old expectations and ways of working. Start with a clean slate, taking your customer and business objective as your start point.
- Think creatively about data. Pursue new avenues and data sources to deliver the outcomes you want (finance and customer service, for example).
- When you've found the data you need, locate it in your CDP from where it is readily actionable.



73%

The amount of **data** that goes unused, according to **Forrester research**



04. BLEND DATA, RULES AND ANALYTICS DECISIONING HOLDS THE KEY TO LEADING CX

Decisioning holds the key to maximising every single customer interaction and relationship. It allows you to balance the needs of the customer and the business in each moment, steering the business towards its objectives while maximising value for customers.

But it's much misunderstood. In essence it is a technique that blends data, rules and predictive analytics to make smart decisions about what to talk to customers about, and where, at any given moment. It connects the dots between historical and live customer data, operational data, and business data, and selects the right action to take.

Mastering decisioning is critical in a world where customers are rejecting the traditional, linear customer journey in favour of something they shape themselves. Things to do:

- Bring decisioning - based on data, business rules and analytics - together in one place.
- Gather the right blend of skills needed to get decisioning off the ground: data scientists; IT professionals and engineers; marketers; e-commerce and marketing technologists.
- Don't be taken in by vendors promising an AI-powered "black box" that will bring transformation with a flick of a switch. It is a technique to be mastered - a combination of data, tools, systems and processes.
- Inventory, imagery, prices: incorporate business data into decisioning in real time.



“The alternative to centralised decisioning? Siloed, point solutions that are difficult to manage and time consuming to build. A mass of spreadsheets and emails. And a disjointed, sub-par customer experience.”

Paul Murrell

Director of Partnerships- Boxever



MORE REVENUE, BETTER SERVICE
MORE POWERFUL BRAND
**GET A HANDBRAKE-FREE
CUSTOMER DATA PLATFORM**

To learn more, listen to our webinar [‘The CDP Evolution’](#)

If you'd like to talk about your business, customer data and personalisation, we'd love to chat. We'd be delighted to introduce you to our groundbreaking personalisation platform - including an industry-leading CDP and decisioning engine - and show how we can help you make every customer interaction smarter.

Book a demo [here](#)

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