



Solving the Data Problem:

Using Data, Analytics and Reporting to Deliver the Right Customer Experience

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As Global SVP of Marketing Sciences for POSSIBLE, Jason manages a team of 75 digital analysts, user researchers, and testing and targeting experts around the world to support global client marketing initiatives with data-driven insights. With more than 14 years of digital product and marketing experience, he has worked with clients such as Nokia, Dell, Ford, Microsoft, and Coca-Cola to evolve digital experiences based on real-time feedback and behavioral data. Before joining POSSIBLE, Jason was the director of marketing for j2 Global Communications (eFax) in Santa Barbara, where he built its analytics and optimization strategy. Jason has spoken at industry events such as SXSW, eMetrics, Seattle Interactive Conference, and Ignite.



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As one of Acquia's primary tech writers, Reena excels at communicating brand message, product information and thought leadership to diverse audiences with different content expectations. With eight years experience in digital marketing, social media and content marketing, Reena has worked with a variety of global brands, helping them meet or exceed their business goals through digital marketing strategy and production. Prior to joining Acquia, Reena was part of the marketing team for WPP agency Mirum and Senior Social Commerce Specialist at Sony Electronics.



Introduction

While digital has created a great new way for businesses to interact directly with their customers, it's also led to a scary time for marketers.

They are shouldering a heavier burden than ever before; they not only own the branding and messaging, but have also taken on commerce, social media, any and all aspects that involve the customer. And while digital has given marketers a direct line to their audience, the reverse is also true: it's given customers a direct line back to the business. Customers expect to be known by the brand. They expect brands to understand who they are, what they want and why. Marketers are struggling to find ways to do this. They are looking to learn from each interaction and conversation with the customer. These interactions generate data that can be collected, analyzed and then used to create a deeper personalized experience that each customer has now come to expect.

With a wealth of customer information rolling in from weblogs, marketing tools, social networks, etc., it's not surprising that Big Data has also become the responsibility of the marketing department. Digital agency POSSIBLE, who authored the book "Does It Work?", a complete guide to navigating customer behavior through understanding data, sheds some light on what customers want:

“ We all know that we respond better to what’s more relevant to us. In today’s more personalized age, we expect brands to know a little about us and to treat us in a novel and surprising way.... Without much effort at all, digital technology can give you a lot of insight about your audience. As your customers browse through your digital properties, they’re constantly telling you things about themselves. ” - From the book, “Does It Work?” by Shane Atchinson and Jason Burby

However, although the Big Data collected from digital activity is a great resource to gain insight into user behaviour, there is such a thing as too much information. With marketing roles becoming increasingly complex as the industry responds to the rapid pace of digital, how can marketers spend the time necessary to sift through these mountains of data and maintain their creative edge? Understandably, marketers already grappling with their new job functions are overwhelmed. They know they need to be data-driven, but how? Even as more and more data continues to pour in, there is hope; there is a way to focus in on the information you actually need to make the right decisions for your business.

Being able to aggregate, analyze and segment data is a must, but doing so accurately and efficiently is where the challenge lies. Taking an open approach to data allows you to structure and centralize customer information in ways that work best for your business – freeing up time to think, to create, and to breathe. Being data-driven shouldn't kill the creative process that is so essential for marketers. Data should fuel the creation of a great digital experience, not stifle it.

Leveraging Data for Customer Success

Data exists to be analyzed, broken down and explored in order to find the bits of information that back up decisions, prove a point, answer a question or solve a mystery. Data is constantly flowing and there are many different ways to leverage it for your business needs.

But to serve a business – and its ever-changing needs – data should be open. This doesn't mean that all your company data should be floating around the web. That's the stuff of nightmares (or sweet dreams if you're a hacker). What this means is that customer data has the ability to flow between your choice of marketing tools and across siloed departments. The data is yours – you own it. But a truly open approach means moving towards data that can be shared and transformed transparently without sacrificing your customers' privacy.

There are several core benefits to taking this type of approach to data within your organization:

1. Assemble your choice of marketing tools

The marketing technology landscape continues to expand with an ever-growing list of new tools, programs and software. Many of these are being created to help marketers understand who their customers are. In order to have access to the marketing technology that best fits the needs of your organization, you need to take an open approach to marketing as well as data; one that allows custom integrations of the tools you have now and any you may want to adopt in the future.

In contrast, a closed approach to marketing would mean sourcing all of your marketing technology from a single proprietary vendor, usually under the heading of a marketing cloud. Proprietary marketing cloud vendors not only control what tools are integrated and when, but also how data is exchanged, consolidated and viewed.

This gives organizations the freedom to choose their preferred marketing tools, including analytics and reporting tools with the added benefit of being able to upload your customer data into Google Analytics, Tableau, Omniture, etc. When all your marketing technology is truly integrated, data exchange becomes much easier and the data becomes much more valuable. Without this ability to easily integrate, you are stuck with the tedious task of exporting, formatting, and uploading data manually. Who has time for that?

2. Create your own dashboards

Now that you have the data you want and the tools you need to analyze it, the next step is to visualize the data the way you want. Creating your own custom dashboards means your data is displayed how you want it, without having to wait for a vendor to do it for you or being stuck in generic dashboard with no customization for your business needs.

Being able to build and customize your own dashboards means that you can then build out your own segmentation. Capturing information about specific segments is especially important when it comes to anonymous users; without it, personalization would be next to impossible.

3. Build a centralized, comprehensive view of your customer.

Data? Check. Reporting tools? Check. Dashboards? Check. Now what? While creating custom dashboards is essential to reporting, how do you make sure all customer information is compiled in one place? Create a unified customer profile.

A [unified customer profile](#) collects and refines your business' understanding of a consumer from the very first interaction a visitor has on your website and continues to build with each subsequent action he/she takes. Done properly, the profile collects from multiple channels (web, social, media) and even brings in offline data (e.g., loyalty card). The unified customer profile merges anonymous profiles with known as soon as a visitor identifies himself by signing up for an email newsletter, creating a profile, etc. This information is stored in a central location, allowing it to be shared across your entire marketing organization and giving everyone a complete view of the customer.

Because unified customer profiles are (wait for it) unified, you also reduce the risk of continuing to market to someone in the same way after their needs have changed. Consider an auto manufacturer that wastes money on retargeting and dynamic personalization for a customer who already bought a car from that manufacturer two weeks ago. When data is fragmented and incomplete across multiple departments, the company as a whole becomes less efficient at communicating, which brings us to the next benefit:

4. Unite your marketing organization

A modern marketing organization is composed of several departments – demand generation, product marketing, content marketing, etc. – and each has its own set of marketing tools to help achieve specific marketing goals. Each one of these tools collects and displays different types of customer data that each team needs to function day-to-day. But for a marketing department as a whole to succeed, there needs to be collaboration between teams. For example, if an email is going out with the last three blog posts, the content team has written about a particular product, then the demand generation team, the content team and the product marketing team should all know how that that campaign performed. Whether your goals are to build lifelong customer relationships (B2C), generate qualified leads (B2B) or monetize your audience (MEP), your marketing teams need to be aligned around the customer data.

When teams become siloed and no longer have access to the knowledge of what the rest of the department is doing, they don't really know what their customers are seeing from the global brand perspective. Sure, they have their piece of the puzzle, but no clear idea of what the end picture looks like. With demands already weighing on marketers, data can be the bridge that brings teams together. Data can break down silos in a way that doesn't impact established workflows but allows each team to have visibility into all department activities, giving them a complete view of the customer at every phase of their journey.

The Rise of Real-Time Marketing

Right about the time that the term “web personalization” popped up, so did real-time marketing. Today it often refers to capitalizing on social media trends (which have seen some understandable backlash), but real-time marketing is more than using a popular hashtag or grabbing a few coworkers to take a photo of you Vadoring them, or whatever the meme of the moment may be.

Although most examples of real-time marketing involve responding to trends or current events, where being timely and clever can get your content to be shared by the masses, real-time marketing in this case refers to tailoring the digital experience as the customer engages with you. This is where data collection comes into play, making it less hit-or-miss than the social media definition of the term.

If you've adopted a real-time marketing approach to data, then it can be assumed that you are collecting customer data from their very first interaction; using that information immediately while they are still on site rather than just to improve the experience on their next visit. Even for anonymous users, you can see where they are located. While they are on the site, you can see what they are clicking on. This gives you a huge opportunity, even with just those little pieces of the puzzle, to provide this visitor with a product recommendation or an offer right then and there. You can't do this unless you're collecting, centralizing and analyzing your customer data; data is the only way to make real-time marketing work.

Turning Insight Into Action: Using Data to Inform Decisions

Once you have a fundamental understanding of who your customers are, what they want and more importantly, what they don't want, you can tailor your digital presence. Changing the experience based on the wants and needs of your customer is the foundation of personalization.

“ The principle of One Size Fits No One requires a customer-centric viewpoint. This means that you should be less interested in what you want to tell people and more interested in tailoring your communications to their expectations. You don't have to abandon all marketing strategy and leave the site experience solely up to the user's desires, but you should incorporate their mindset into your thinking. ” - Does It Work? by Shane Atchinson and Jason Burby

Personalization is no longer an option; according to a [2013 study released by Janrain](#), 74 percent of online consumers get frustrated when they are presented with content that is not relevant to them or their interests. Customers expect and even demand that you know what they want to see, read, watch and/or hear when engaging with you digitally.

Once you know who your customers are and what they want, the next thing you need to focus on is changing the digital experience across channels based on your data. Your web experience is key; it is just as important to present the right content as it is to remove content that isn't relevant. Insights you get from your web experience can also translate into improved experiences on other channels such as an email campaign. It should be the ultimate goal of your business to have as close to a one to one relationship with each and every visitor, prospect and customer as you possibly can. Data is the bridge that connects you and strengthens that relationship.

Using Data for B2C Digital Experiences

The best example of insights being applied to personalization is within the B2C space. While personalization is an expectation of customers, it is also a benefit to companies. Using your data insights to create relevant, customized digital experiences leads to:

- Increasing online purchases, return visits, registrations, and engagement
- Improved brand awareness
- Driving higher customer lifetime value

The better you are at personalization, the more you can fuel repeat site visits and improve purchase conversion across all touch points. The more interactions you drive, the more data you collect, the more insights you can explore, the better your digital experience becomes, etc.

Using Data for B2B Digital Experiences

According to a 2015 poll by Starfleet Media ([via eMarketer](#)), 78 percent of B2B marketing professionals worldwide said that website analytics tools were their top choice for content and lead generation. When you are using data to drive business prospects, you want to tailor your digital experience to your key targets and personas. Presenting relevant content is critical to success here; it's all about speed. A prospect needs to find the information they are interested in quickly. By collecting data in real-time, you can create an experience personalized to their potential industry and business, leading to:

- Lead generation
- Shortened sales cycles (engage prospects with sales team quickly)
- Improve event registration

Showing any potential new customer that you understand them before they even pick up the phone gives you a competitive advantage from the start.

Using Data for Media, Entertainment, and Publisher (MEP) Digital Experiences

When you work in media, entertainment or publishing, digital has fundamentally changed your business and has been a struggle. Now everyone is a publisher and content is often free. How do you continue to grow your business and generate revenue when everyone has a blog, website, YouTube channel or podcast? The answer (again) is using data to create a customized experience for every visitor. In this case, it's all about displaying relevant content and continuing to recommend articles, videos, blog posts, etc. that are in line with the interests of your visitors. While creating unique, timely and engaging content will always be a top priority for MEP companies, getting eyeballs on that content is equally as important. Personalized content and recommendations will:

- Increase revenue through ad impressions
- Sell more content subscriptions
- Monetize audience data and identify new revenue streams

The best way to succeed in a space where you are constantly competing for attention is to exceed your customers' expectations of their media and brands. Deliver compelling websites, content, and offers that explicitly relate to their specific interests, based on their behavior.

Using Data to Inspire Innovation

In addition to the benefits listed above, access to certain customer data throughout your organization enables smart people in your organization to make your analysis even smarter. With tried and tested techniques in machine learning, for which there are now several open source toolkits available (libraries in R, Python, etc.), marketers have an unprecedented ability to glean sophisticated insights about marketing effectiveness and customer behavior.

Marketers are increasingly taking advantage of (or even building) advanced algorithms for auto-personalization, content recommendations and personalized offers, profile merging (anonymous to known across multiple devices and channels), and relative value modeling to build mature, data-driven marketing organizations. Producing a machine learning model that can make reliable predictions requires a lot of training data, so the more data you have access to, the better.

The more historical data you push through a model as it's being constructed, the more you can battle test it before releasing it for use on customers. A marketing department at a business that subscribes to this approach to data has a tremendous advantage when building and testing holistic models over a more siloed organization where the marketing department has to cobble together bits of disparate, older, or, even worse, "hypothetical" data to do the same thing.

Even past the hard data science, opening up data across the organization inspires innovative thinking and creative problem solving that every aspect of a marketing department can take advantage of to make a message or product more resonant. Some of the best purely creative professionals across the advertising industry are seeing this:

“Creative people don’t come up with brilliant ideas in a vacuum...The best ideas are usually born from a deep understanding of the problem you are trying to solve or a familiarity with what your audience really wants. Data is not about a right or wrong answer. Data is not prescriptive. It’s just a way to understand the behaviors and patterns that might ultimately inspire you.”

- Jon McVey, Chief Creative Officer, POSSIBLE, From the book, “Does It Work?” by Shane Atchinson and Jason Burby

Digital experiences need the ability to be delivered in a coupled or decoupled way to any channel or touchpoint. All of the components of the Acquia Platform are built with an API-first approach to enable them all to be used independently to build a solution tailored to the organization's specific needs and environment.

Conclusion

The phrase “speed of innovation,” while buzzworthy, really doesn’t indicate how fast digital is moving. The digital space continues to grow at a staggering pace, with no chance of slowing down anytime soon. The only way to stay on top of what’s new and what’s next is to be smart about technology and to use data to your advantage. As Forrester declared, we are living in the Age of the Customer and the companies who can deliver digital experiences that are not just personalized but inspiring and welcoming are the ones who will continue to come out on top. If you want to get inside your customers’ hearts and minds, you need to pay the utmost attention to what they are telling you through their actions and let data lead the way.

To purchase a copy of Does It Work? by Shane Atchinson and Jason Burby, [please visit http://www.possible.com/doesitwork](http://www.possible.com/doesitwork)

LET’ TALK

