

# The Customer Experience Cloud

How To Unify The Organization Around A Seamless Customer Experience

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## EXECUTIVE SUMMARY

Today's customers demand to be recognized as the same unique individuals across every channel, whether online or offline. They don't care about which part of the company they are dealing with, to them, there's only one brand. Yet, companies continue to give customers a disconnected experience, with sales, service and marketing each working to engage the audience on their own, without coordinating their efforts. It makes customers frustrated, disengaged and disloyal. In a survey, 89% of customers said they had switched brands due to a bad customer experience.<sup>1</sup>

Till now, most companies have been driving these unification efforts within the marketing department, who are seen as natural custodians of the customer experience. But to truly deliver a seamless customer experience across all touchpoints, companies can extend these efforts across sales and service departments as well. Hence, technology strategies will evolve from building a "marketing cloud" to building a "customer experience cloud."

This report outlines the essential components of the technology and teams needed to build a customer experience cloud, as well as the crucial steps companies can take to get started. It also has a guide to choosing the right technology, and an overview of the major technology vendors who can help companies deliver on this vision.

# The Customer Experience Cloud: How To Unify The Organization Around A Seamless Customer Experience


## INTRODUCTION

Imagine you're trying to watch your favorite show on TV, but your cable connection suddenly doesn't seem to work. In a fit of annoyance, you quickly try to access your cable company's website, trying to troubleshoot the problem yourself, but you can't find the right content page. As your frustration mounts, you call your cable company, and after being on hold for 30 minutes, you finally talk to a customer service representative, who makes you repeat your phone number and email address as you tell them your problem. She makes a note of it and promises that a repairman will show up tomorrow. However, the next day comes and goes, and there's still no sign of any help. You angrily call the company again, only to have to explain your problem to a different customer service representative. Meanwhile, you have received two marketing emails and a sales call from the cable company, urging you to sign up for a new package deal that'll save you 10%.

Despite having an active presence on every digital channel, the cable company has delivered an extremely disconnected, and hence extremely negative customer experience. It's managed to do this, despite each one of its departments arguably doing its job. The service team dutifully answered your phone call and logged the complaint, the marketing team probably recorded you as a website visitor and sent you a promotional email, and the sales team followed up to make a one-on-one connection via phone. All three departments however, collectively earned your ire for the simple fact that they didn't recognize you as the same person, across every interaction.

Today's customers don't care whether they're talking to the marketing department or the service department. To them, there's only one brand, and they demand to be recognized across the entire company as the same, unique individual. When the customer doesn't care about what department they are speaking with, why do brands continue to keep customer data in separate boxes for sales, service and marketing?

To provide a unified experience on the front lines, a brand must be unified on the back end as well. This means a new way of doing business, one that unifies the entire organization around delivering a seamless, personalized and relevant customer experience, no matter where the interaction takes place.



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## DISCONNECTED EXPERIENCES ARE A BUSINESS RISK

A customer's expectation of a seamless, multi-channel experience is more than just a nice-to-have perk; it's the new reality of how they want to do business. Not delivering on that demand can have tangible, negative effects on the business. These include:

### Frustrated consumers

According to Accenture, 66% of consumers find it extremely frustrating to have to repeat the same information to multiple employees of the company or through multiple channels.<sup>2</sup> When customers aren't recognized from their previous interactions, it leads to frustration, and the loss of their already short attention span. And when a customer leaves due to a bad experience, they're likely to take others with them, 95% of dissatisfied customers are likely to tell others about their bad experience.<sup>3</sup>

### Inefficient Organization

When customer data sits in silos, each part of the organization tends to have its own perception of the customer, which may or may not be aligned across departments. In addition, each department operates with its own set of engagement and data tools, when they could be coordinating their efforts using the same platform. That means extra IT costs, and the duplication of data management and governance efforts. Unifying departments around customer data isn't just good for aligning departments; it has a real impact on revenue. McKinsey found that an integrated analytics approach could free up 15 to 20% of marketing spending, which can be reinvested into other efforts, or simply added to the bottom line.<sup>4</sup>

### Irrelevant Brand

In a 2014 Gartner survey, 89% of companies said they expected to compete primarily on the basis of customer experience by 2016.<sup>5</sup> Customers today don't just compare brands to their direct competitors, they compare them to companies in other verticals that are providing superior customer experiences. Brands like Amazon, Uber and Zappos are setting new benchmarks for what seamless, frictionless customer experiences look like, and are influencing how customers expect to be treated. With subpar customer experiences, brands don't just risk losing to the competition, they risk becoming irrelevant.

## WHY THIS VISION IS SO DIFFICULT TO ACHIEVE

Even if companies recognize the need to unify customer data, acting on that vision is no easy task. It means overcoming several organizational, cultural and technological obstacles, all of which need significant investments in time and money.

### **Lack of leadership and strategy**

Whether it's due to limited resources, internal bureaucracy, or just plain lack of awareness, the paucity of internal champions means most customer experience unification efforts never get off the ground. A lot of times it's a matter of embedded culture and language which is hard to change. "We speak so naturally about what's digital, but in many people's minds, digital just means technology, and e-commerce," says Grimur Fjeldsted, Digital Innovation Manager at Innovation Lab, ECCO. "We need to embrace it as a top level strategy, as a way of doing business, and you need to push that to top management."

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## Disparate department goals

Unifying the company around the customer experience means more than physically breaking down silos, it means aligning the goals and success metrics of each business unit. For example, at one outdoor equipment company, the “brand” team (which managed communications and messaging) was separate from the digital team, which managed only the e-commerce website. Even though both teams were using the same digital channels, their goals were completely different, with the brand team focusing more on creating a relatable, sporty image of the brand, and the digital team focusing more on driving transactions. As a result, the teams constantly disagreed about the type of content on the website, as well as on social media, leading to an end result that didn’t satisfy either goal.

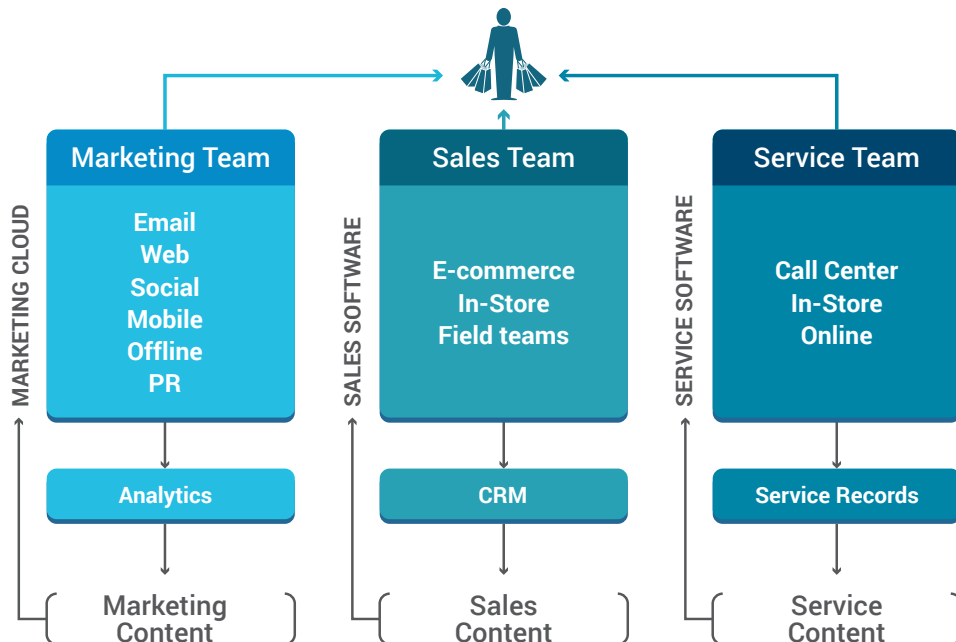
## Too many technology options

Even if a company decides to rip out all its software systems and buy a massive, integrated suite of tools, the thousands of technology options that are available to them can be paralyzing. A 2014 survey by DNN Software revealed that 66% of marketers felt they had too many marketing technology vendors to deal with, and 70% said marketing had become even more challenging, despite the large number of technology solutions available.<sup>6</sup>

## Siloed customer data

Customer data from every channel usually sits in separate department or channel-specific silos, (see Figure 1) and uniting them is a costly, time-consuming process. A major cause of that is the different technology platforms being used by each department. Sales teams and customer service units now communicate with customers through the same digital channels as the marketing departments, and yet, most of the time they’re operating completely different software. The marketing department stores anonymous customer interactions in an analytics platform, the sales department can only record customers in a CRM system after they’ve made a transaction, (or have expressed interest in doing so) and the call center folks only have records of the people who call in, with no history of where they are coming from or what their previous interactions with the company have been. Because of this siloed approach, it becomes very difficult to create a holistic view of the customer, and consequently put a holistic strategy in place.

**FIGURE 1** SILOED TEAMS AND DATA RESULTS IN DISCONNECTED CUSTOMER EXPERIENCES



Source: Altimeter, a Prophet company

## FROM “MARKETING CLOUD” TO “CUSTOMER EXPERIENCE CLOUD”

For the past few years, companies have been focusing their efforts on first, being present on all the channels their customers are on, and second, presenting a consistent brand message and voice across each touchpoint. Technology vendors responded by creating “marketing clouds,” which are integrated software suites that allow brands to orchestrate content delivery across multiple digital channels such as social, mobile, email and the web through one central hub. If companies weren’t using a marketing cloud, an alternative strategy was to assemble a variety of point solutions for each channel, and try to make them work in an integrated way.

Marketing technology has allowed marketing operations to achieve a remarkable degree of sophistication, especially when it comes to delivering personalized content, or processing real-time customer interactions. It has also enabled the marketing department to integrate its strategy and software. But that progress is still confined to only “marketing” experiences. The big opportunity for companies now is to take the advances in integration they’ve made in the marketing department and extend them through the rest of the organization. Each department can be given a stake in the customer experience, and visibility into a single, integrated technology stack. In doing so, the use of the “marketing cloud” can evolve to become the “customer experience cloud.”

Putting the customer experience cloud into practice is a major effort that will mean reorganizing teams, setting new governance, buying new technology and establishing new processes. It is nothing short of a comprehensive digital transformation. With so many parts of the puzzle required to fall in place simultaneously before any real execution, the most daunting part is knowing where to start, and that’s usually an issue of leadership.

### Name a Clear CX Leader

A big question for most companies attempting this cross-functional unified approach is “Who owns the customer experience?” Ultimately, any person or team can play the role of the customer experience leader, but at the very least, they would ideally perform these four functions:

1. **Be the voice of the customer** within the company, representing their needs, wants and behaviors through research and analytics.
2. **Create the final vision** of what the ideal customer experience looks like, and evangelize it to the rest of the organization.
3. **Bring together all the company stakeholders** in the customer experience and assign ownership of different parts of the customer journey.
4. **Maintain knowledge of the latest trends** and technologies that can affect the customer experience.

A popular choice for this role is the CMO, since they are already overseeing much of the same unification efforts in marketing, and it makes sense for them to carry on the same practices through the rest of the organization. But in order to avoid territorial clashes with sales and service leaders, an alternative is to create a separate, cross-functional team, often headed by an appointed Chief Digital or Chief Customer Officer.

At McDonald’s, Chief Digital Officer Atif Rafiq heads a team that is tasked with spearheading a cross-functional effort to make the McDonald’s experience more digital and convenient for its customers. Rafiq says it is the digital team’s job to not just create and evangelize the vision of the seamless digital experience, but also stay abreast of all the new digital trends that affect it. “You need folks with accountability to understand which direction technology and behaviors are moving,” says Rafiq. “And to be able to bring that thinking in, we have to paint a picture that gets the company really excited and supportive about the final vision.”

General Motors also has a separate customer experience team, which, along with GM's connected car service unit OnStar, forms the Global Connected Customer Experience group. The group is responsible for conducting qualitative and quantitative research on customers in all of GM's major markets, and using it to build customer journeys for each of GM's business units. "We spend a lot of time taking our people through what customers actually want from their experiences and have them focus on being far more customer centric," says Dave Mingle, Executive Director, Global Connected Customer Experience Program Execution at GM. "We're saying 'don't just talk about the digital marketing experience, let's talk about the digital experience,' which is where all this stuff starts to connect and become far more integrated."

Mingle's group is overseen by the SVP of Global Connected Customer Experience Alicia Boler-Davis, who reports directly to CEO Mary Barra. "Having that level of commitment from Mary and her staff allows us to have a lot more influence and get people's attention as a strategically important function rather than trying to do it strictly from the bottom up," says Mingle.

The best thing leadership can do for customer experience is to make the overall strategy simple enough for everyone to understand, and broad enough so that everyone can play their part in executing it. For example, General Electric's Performance Marketing Lab has a concise strategy of making it easier for the sales team to sell or for the customer to buy. This serves as a beacon to all the different technology operators. "Because the strategy is well laid out, everyone is building out proof points that make sense and can then be brought to senior management," says Andy Markowitz, General Manager of GE's Performance Marketing Lab. "Once we have proof points that can fit into the strategy, that's when we start thinking about how to fit them into the stack, and how to leverage that stack."

## Identify Key Integration Starting Points

Integration can start from any point in the company, whether it's marketing with sales, marketing with service, or even simply unifying all the touchpoints within each of those departments first. Integrating in incremental steps minimizes the risk and the resources being used for the effort. It also allows for a quicker, cheaper path to proving the concept to the rest of the organization.

For example, at Lenovo, it is customer service that is driving the unified customer experience. Siping Roussin, Head of Analytics and Optimization for Lenovo's eServices unit heads the effort to provide customers (who have just bought Lenovo machines) with a seamless multi-touch experience across Lenovo's channels, such as online chat, call centers and emails. "Right now, it's project by project, first uniting service, then digital properties, then slowly going into different parts of the organization," says Roussin. "We're not looking to deliver this all at once, we're trying to do it one at a time."

The integration doesn't have to start in a department either, it can start on a single digital channel. For example at Nike, the unification of digital communications began with social, which initially served only PR and marketing functions, but is now expanding to play a role in service and even product design.

## Hire The Right People

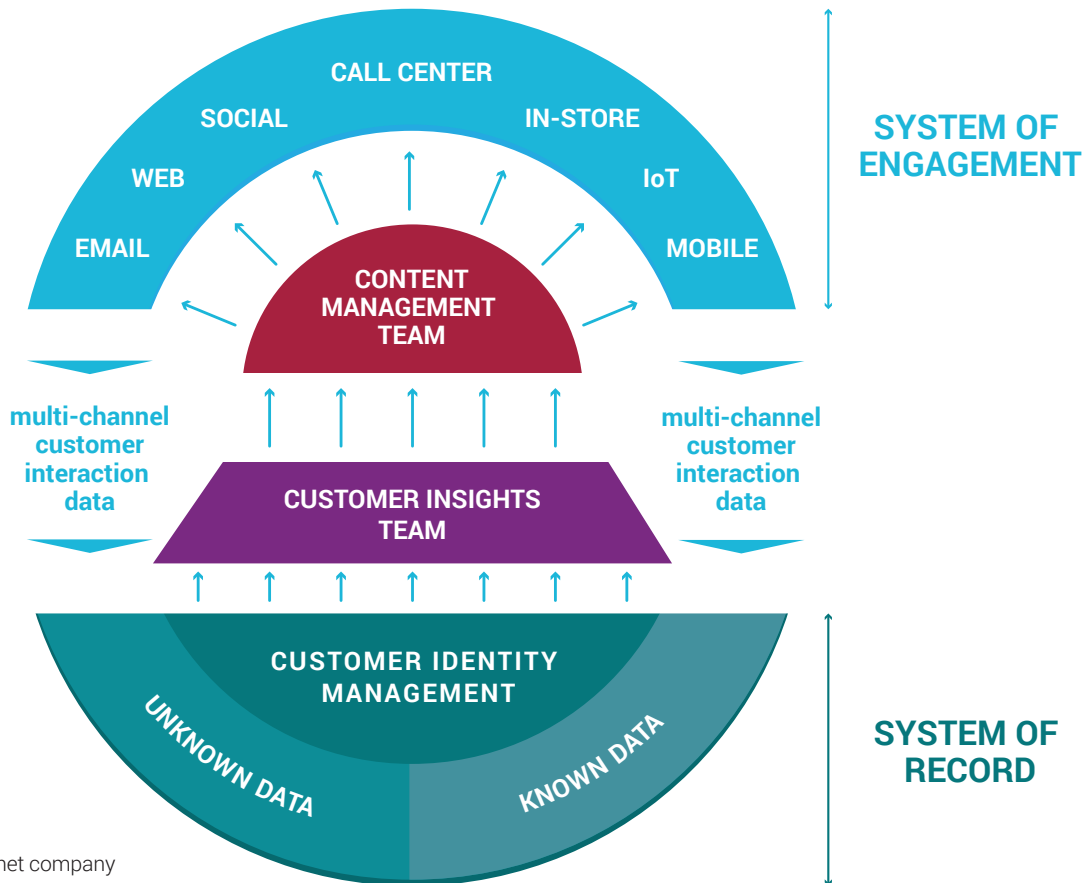
Implementing a new strategy calls for the hiring of new skills. Building an integrated approach around the customer experience first of all requires people who can make sense of all the data which comes in from disparate sources, and can present a common understanding of it to the rest of the company. In addition, an integrated approach calls for hiring employees not restricted to any one channel or function. "Integration is difficult to implement, so we want people who have experience across multiple disciplines," says Brittany DiBenedetti, Consumer Insights Manager at REI. "I'm looking for bigger box thinkers, more strategic thinkers, people who don't just focus on things within their silo."

Along with multi-channel operators, employees who come from tech company backgrounds can bring with them a culture and aptitude around technology which can accelerate a company's acceptance of new digital strategies. GM hired people from Apple's Genius Bar and Best Buy's Geek Squad to train its dealers on connected technologies, while McDonald's has hired former pure-play tech company employees in product manager and user experience design roles.

## ESSENTIAL COMPONENTS OF A CUSTOMER EXPERIENCE CLOUD

While no company has completely achieved the harmonious synchronization of sales, service and marketing, we interviewed several leading brands that had made progress towards this goal. Based on that research, we identified the four essential technological and organizational components needed to deliver a unified customer experience (see Figure 2).

**FIGURE 2** FOUR ESSENTIAL COMPONENTS OF THE CUSTOMER EXPERIENCE CLOUD



Source: Altimeter, a Prophet company

### 1. A System of Record

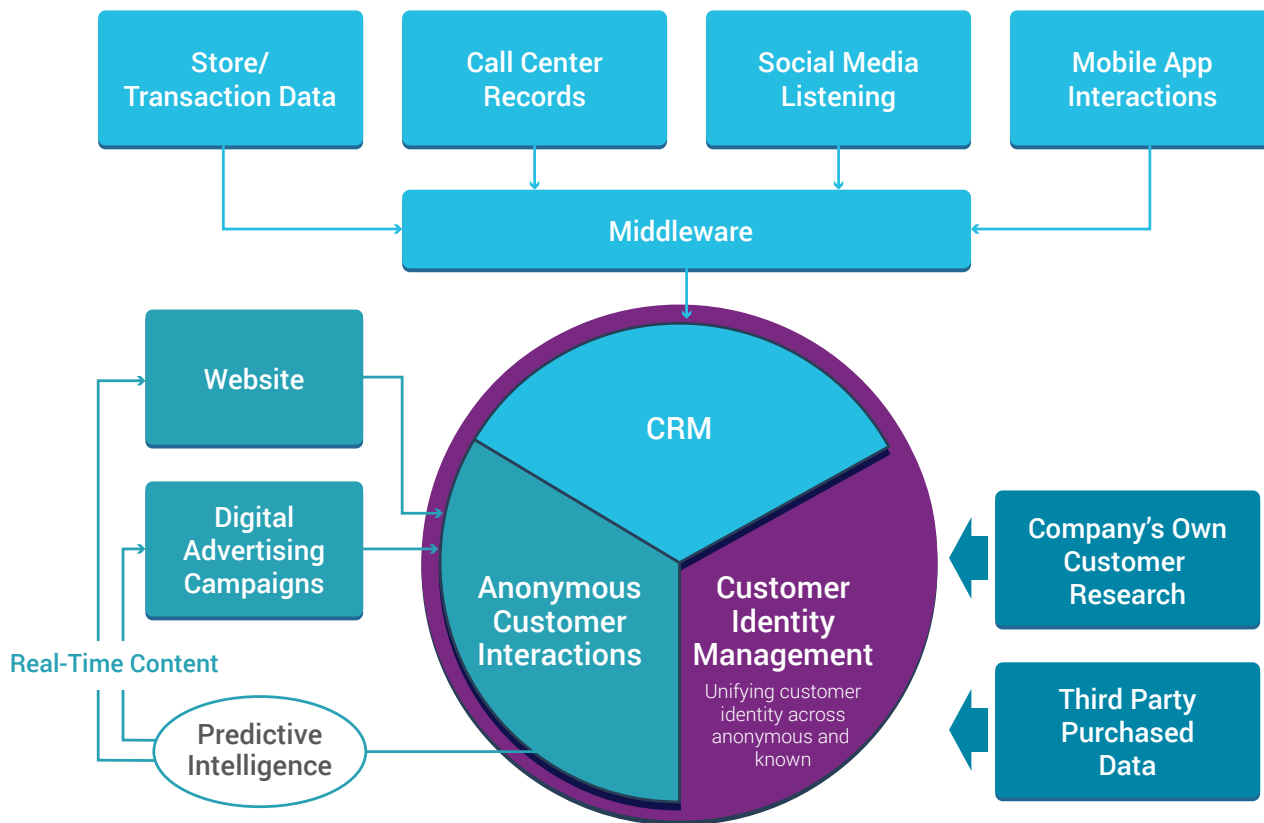
A system of record (SOR) is a single repository of data that houses all the information generated by customer interactions from multiple channels. Its key function is to be able to recognize the customer as the same person, regardless of which channel a customer has interacted with the brand.

The SOR doesn't need to be able to store absolutely every single bit of information generated by the customer, only the data that is relevant, and actionable for designing the customer experience. We're not necessarily talking about old-school databases that house all customer transactional data, and need to be backed up once a week. Those databases (usually) aren't built for real-time access and engagement.



Depending on the size of their customer base and the speed at which they want to deliver experiences, companies can choose from (or combine) a variety of data platforms to create an SOR, such as web analytics tools (for anonymous interactions), CRM solutions (for known interactions) or customer identity management software that can recognize customers across both known and unknown interactions to create a single behavioral profile. Figure 3. is an example of the multiple customer data tools that could make up a system of record for a large B2C company.

**FIGURE 3** TYPICAL SYSTEM OF RECORD ARCHITECTURE FOR A B2C COMPANY



Source: Altimeter, a Prophet company

It is crucial however, for the SOR to have the ability to integrate with multiple tools of engagement, (such as email, website or mobile app) and facilitate a two-way flow of data from them. This allows brands to execute modern digital engagement tactics such as identifying different segments of audiences, and serving them custom content based not just on their demographic information, but their online behavior. For example, an airline could dynamically change the content on its website for a visitor who has just been visiting websites on what to do in Hawaii, showing special deals on Hawaii flights or displaying images of beaches and sand.

Such real-time actions based on data, are enabled by predictive intelligence software. Through algorithms, these tools are able to make connections between data points in real time, and can recommend what type of offers, or content customers are most likely to engage with, or even predict what the outcomes of planned customer journeys are. For example, a sophisticated web analytics platform could recognize what type of product a customer wants to buy based on the pattern

of pages they are browsing and automatically orchestrate an email offer, or a Facebook ad for that product. For any company that wants to embark on real-time, personalized engagement with their customers, analytics tools with predictive intelligence capabilities are absolutely essential.

In a project called “Customer 360,” GM is working towards building a master customer database that is able to perform basic identity management, as well as capture customer preferences, transaction history, survey responses, call center cases and lead requests. Once this is complete, the goal is to then deploy a team of data scientists who can create capabilities for real-time decision-making, and predicting the best offers for specific customer segments. Mingle admits that this project is a resource-intensive undertaking, but emphasizes its necessity. “In order to create better connections across the different touchpoints, we knew we had to take it to the next level,” says Mingle. “That is the cost of doing business if you’re going to be competitive in customer experience.”

Most companies spend a lot of time and money chasing the “360 degree view” of a customer, but most relevant experiences can be designed with simply a “180” or even “90 degree” view. The crucial element is for the relevant data to be in one place, and actionable.

At this year’s Salesforce Connections conference in New York, Jawbone’s Senior Director of Integrated Customer Experience Shanthi Rajagopalan shared her experiences with integrating data streams. “We got a group of people in a room together, created a single journey, got very specific about what we wanted that customer to feel in that specific path, and what messages we want to send to them,” said Rajagopalan. “We came up with five data elements we really needed to find out about this customer in order to fuel this journey - some data elements we were already capturing and just needed to curate, and others were data gaps we needed to fill.”

## 2. A Customer Insights Team

The SOR may house all the data coming in from every channel, but it is impractical for sales, service and marketing to all access it separately, and come up with their own interpretation of it. That’s why there is a need for an insights team that acts as a window into the customer, providing not just a record of their actions, but the context in which they were taken. Since it provides the starting point for building the customer experience, the customer insights team is often most suited to be the leader of the customer experience unification effort, but this does not always have to be the case.

The customer insights team performs four key functions that form the foundation of the customer experience unification effort:

### **Develop rich personas**

Building a customer experience starts with knowing who your customer is. A brand needs to create fully formed personas of their customers based on their values, their online and offline browsing and purchasing behaviors, who they are influenced by, what type of content they consume and what is most important to them when it comes to their relationships. The customer insights team makes creating personas a cross-functional exercise, leveraging every piece of customer information a company can get access to, including web/mobile analytics, the CRM database, third party research and the input of all employees who are engaging directly with customers.

### **Map complex, dynamic customer journeys**

Once the customer personas have been created, companies can start to tailor unique journeys for each persona. The process of mapping the customer journey serves to create the blueprint for all the possible touchpoints a customer will interact with. In complex organizations, the customer insights team creates a process to have the input of all the stakeholders involved.

At GM, instead of mapping the customer journeys for every business unit, the customer experience team helps each unit perform the exercise on their own. "What we're trying to do is teach people how to fish, not do the fishing for them," says GM's Mingle. "As a result, we're starting to see the CX group get pulled into more meetings about the customer journey, rather than us pushing for them."

Creating user journeys for campaigns is common for most marketing functions, but to really serve customers in a continuous, dynamic way, it's better to create user journeys on an ongoing basis. "Companies need to create user journeys that can detach themselves from campaigns, you never know when people are interested in your product, and that's when you need to give them journeys to get attached to the brand," says ECCO's Fjeldsted. "In the campaign season everyone is screaming very loud, but it's probably between those periods that you can get ahead of the competition."

### **Set the final CX vision**

Initially, a brand may only have the tools to deliver a unified experience for part of the customer journey, based on an honest assessment of its current capabilities and a roadmap for what it needs to build out in the next few years to integrate the rest of the journey.

For McDonald's, convenience is a core tenet of its brand, and this informs the end design of all its experiences, both digital and otherwise. Hence, the unified experience is dictated less by what the technology can achieve, and more by how it can deliver on a core brand value in new, innovative ways. "The first step is really setting a strategic direction and seeing how tech can make something McDonald's is known for even better," says McDonald's Rafiq. "Once we can establish what the future could look like, we can work backwards from the future we want to create."

Brands can also look for inspiration outside their own industries for how to design the ideal experience. "We don't spend a lot of time CX benchmarking our direct competitors," says GM's Mingle. "We're looking at the Amazons, the Marriotts, the Delta Airlines - companies that are really showing what a great, integrated end-to-end omni-channel customer experience can look like."

### **Sell it to the stakeholders**

Once the customer journey and its corresponding experience design are clearly defined, the vision can be sold to every stakeholder in the customer experience. In this way, each team can see what part they have to play at every stage of the journey. The marketing team can design content and strategy for the pre-purchase phase of the journey, sales identifies what it needs to do to make the transaction as frictionless and appealing as possible, while the service team can create the optimal post-purchase experience, with complete knowledge of the actions the customer has taken earlier in their journey. Each unit still gets to deliver on the part of the customer journey it owns, the only difference is they are all aligned around a unified strategy.

"The easiest way to sell a unified concept is to take the consumers' POV," says Paul Herman, Platform Director of Unified Communications at Nike. "It's much easier to have the argument from the consumers' point of view, so you have to take the different departments on a walk through that journey."

Another benefit of this approach is that it is a clear way to align the objectives of the business (which is to provide the best possible customer experience) with the objectives of the different departments. Historically, sales, service and marketing have always operated on their own set of benchmarks, and while they may still continue to do so, it becomes easier to identify and remove conflicting interests when everyone is operating off a single blueprint for the customer experience.

"Each of our individual business units have their own KPIs and things they have to deliver this year," says GM's Mingle. "We have to make sure what we are doing will help them accomplish their own goals and not be in conflict with them, and sometimes when they are in conflict, we have to ask people to be patient and compromise for the greater good."

### 3. A Content Management Team

If the customer insights unit is a team of thinkers, a team of doers complements them. A content management team takes the findings of the insights team and turns them into relevant content for all the customer experience stakeholders. This unit acts not so much as a central content factory, but as a content management hub that hosts all the creative digital assets, establishes brand guidelines about messaging and voice, and sets governance about how different company units can deploy content or campaigns.

A good example of such a group is one run by Laure de Bary, the Head of Social, Content and Media, at Nespresso. De Bary's team is responsible for setting the content strategy, based on data from digital channels. "It is first a governance exercise, and then a strategic exercise to identify all the content topics, the stakeholders, and the pillars within the organization that need to be aligned," says de Bary. While the team does not produce all the content for the brand, it does set governance for the production processes, as well as consistent guidelines for tone, visuals, and messaging. This enables the company to have multiple content production centers, all operating from the same central blueprint. This content strategy is directly informed by the findings of the customer insights team.

De Bary's team works very closely with Nespresso's dedicated customer experience team. This team is a combination of the CRM and customer insights groups, and is in charge of designing the omni-channel customer journey. "We first have to have the vision of where we want to land, and what is the minimum amount of data we need to have (in-house or third party)," says de Bary. "We can then identify the business requirements for orchestrating the data and building the system around this."

Having a central content management team also allows Nespresso to use social media for more than just marketing purposes. The content team creates and shares the content calendar with multiple departments within the organization such as Nespresso PR, customers services, the corporate team, local markets and the commercial team, making sure everyone has insight into the social strategy, and is able to fit into it with the right content at the right time.

### 4. A System of Engagement

Finally, a system of engagement (SOE) is needed to deliver all the experiences that have been crafted by the content team, and informed by the insights team. The SOE is the ecosystem of all the software that is used to push content or messages to the customer, while recording the data from each interaction. This set of tools varies for each company, but broadly, it means a management platform for every channel that a brand is trying to reach customers on. This could include any combination of a web/mobile app content management system, social media marketing platforms (both listening and publishing), a marketing automation (usually meaning email marketing) platform and mobile messaging system.

To build a system of engagement, a brand needs to first determine the channels where its customers are willing to engage with the brand. It can then choose the individual tools to manage customer engagement on each of those channels. A final goal is to integrate these tools, which means they can be operated from a common dashboard, access the same customer data, and deliver consistent branded content at scale. This allows for channel operators to work within their own realms, but still achieve a level of coordination that shares data, and makes the experience consistent.

While that's not always possible in most companies, any level of integration is better than operating each platform completely independently.

"I'm looking for bigger box thinkers, more strategic thinkers, people who don't just focus on things within their silo."

**Brittany DiBenedetti,**  
**Consumer Insights**  
**Manager at REI.**

## CHOOSING THE RIGHT TECHNOLOGY

If customer experience is the canvas, then technology is the paintbrush. This serves as a reminder that the technology is only as good as the customer experience strategy that is deploying it. The temptation is for each department to optimize the technology options for their particular part of the customer journey. Jawbone's Rajagopalan explains why departments shouldn't come up with their technology requirements in a vacuum. "We found that it was very natural for people in their silos to think about the tools they previously used to solve problems. If you asked marketing, they would say 'send them an email,' the app team would say 'send a push notification,' customer care would say 'have a self help article on the web,'" says Rajagopalan. "But the problem is it's not any one of those things, you have to know which one to deliver to which customer at the right time."

On top of the organizational challenges of choosing the right technology, there's the myriad of options available today, numbering in the thousands. A common question for most brands about their technology strategy is whether to buy a collection of best-of-breed solutions, or to buy a single suite of solutions that may not be the best-in-breed for their category, but have the benefit of integration (i.e. a marketing cloud). While there are arguments to be made on both ends, there is no denying that a system of tools that are integrated out-of-the-box are far more desirable than buying several high-quality tools, only to have to spend valuable time and resources getting them to talk to each other.

Altimeter's research found that there are two factors that drive these complex technology decisions; 1) The number of channels brands want to engage customers on, and 2) the complexity of the data they want to process.

### Number of Channels

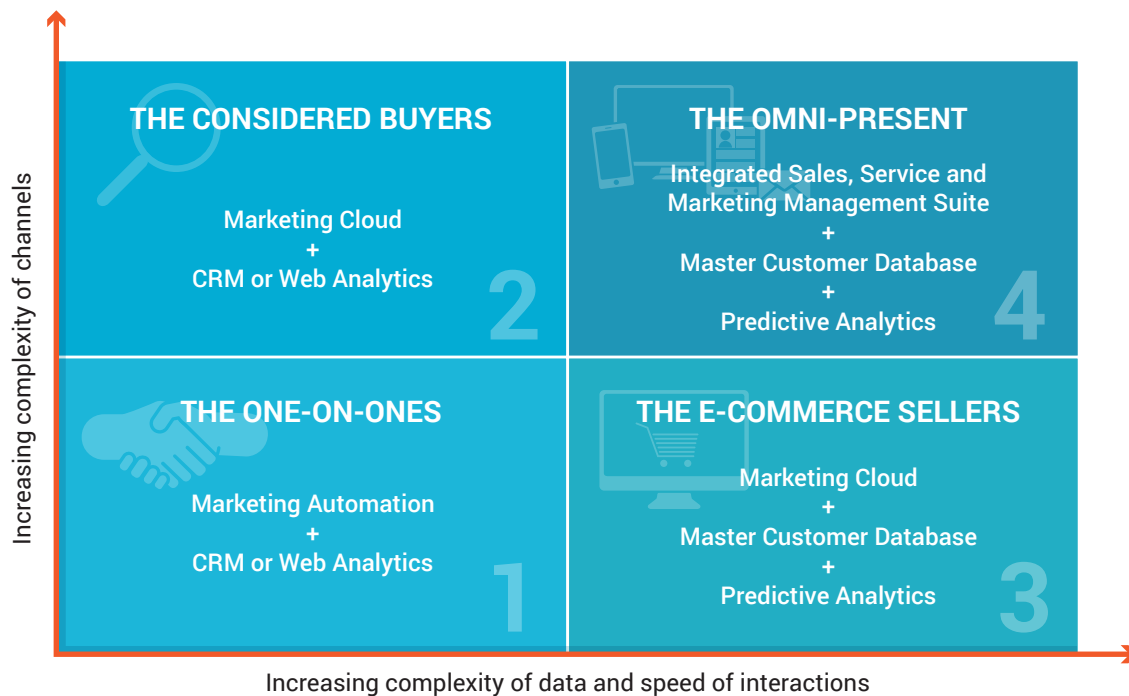
As a company increases the number of channels it wants to engage customers on, its requirements for the SOE also increase, from managing maybe one to two main channels, (such as the website and email) to many more integrated channels, such as mobile, social and the Internet of Things. A basic SOE could be a marketing automation, or a social media management platform, and at the more complex end, it could be a full fledged marketing cloud. It's important for a company to decide which channels its customers are most likely to be present on, and acquire technology to specifically manage only those channels. It's also important for brands to remember to buy technology not for where they currently are, but for where they want to be in the next five years.

### Complexity of Data

The complexity of data starts to increase with the size of the customer base, and the speed of interactions they demand. At the basic level, a simple CRM system can work as an SOR, but as the customer database grows to include both known and anonymous customer interactions - and the demand for real-time, personalized engagement increases - the SOR must evolve, adding layers of predictive intelligence and customer identity management.

These two components create a grid, where companies can place themselves in the quadrant that most closely matches the level of complexity they aspire to in both channels and customer data (see Figure 4). Each quadrant represents a type of customer experience organizations want to deliver, and the corresponding technology that can be used to deliver the experiences they want. By placing itself along the matrix, a brand can identify where it falls on the spectrum of data complexity and number of channels, and then choose the type of technology it needs to deliver on the right experience.

**FIGURE 4** CHANNEL AND DATA COMPLEXITY DRIVE TECHNOLOGY CHOICES



Source: Altimeter, a Prophet company

**1: One-on-Ones**

This quadrant is defined by a limited brand presence on digital channels and a basic SOR. Examples of companies that occupy this quadrant could be professional advisory and service firms, B2B sales, or high-end consumer concierge services. Since customers are usually identifiable, with a long, deliberate path-to-purchase, the speed of interactions and complexity of the data can afford to be low. And since customer engagements are usually personal and built on one-on-one relationships, the SOE can also be minimal. On the SOE side, a basic marketing automation platform that manages one or two channels can be sufficient, but it should be able to sustain and scale one-on-one interactions. This platform can integrate with a simple SOR (such as a CRM platform).

**2: The Considered Buyers**

As we move up the matrix, the “Considered Buyers” quadrant represents customers of large B2B companies, (such as enterprise technology vendors, for example) whose customers still take a time to navigate path-to-purchase, but are more likely to engage with the brand on many different channels, whether through consuming marketing content, being prospected by sales, or troubleshooting with customer service. Customers in this quadrant are also likely to consume lots of content on a product before they decide to buy, which means that the SOE must be more sophisticated, and have the ability to scale. This is where a marketing cloud, integrated with a CRM solution can be a suitable combination.

### 3: The E-Commerce Sellers

Moving from left to right, we find brands that are most likely to engage many customers on one main channel (usually a website) supported occasionally by another (such as mobile or social.) Brands that fall into this category can include e-commerce brands, which rely on the website to provide almost all of the customer experience. Other companies in this quadrant could be mobile-only service providers such as Uber. However, even though the channels are few, the size of the audience calls for advanced engagement tactics such as real-time, personalized content delivery, retargeted ads and customer loyalty programs. This can only be achieved through a more complex SOR, that has predictive intelligence capabilities and can store both anonymous and known customer interactions.

### 4: The Omni-present

This quadrant is where the most complex version of the customer experience cloud exists, when the SOE is being utilized by sales, service and marketing, and the SOR is able to house all forms of data, both structured and unstructured, with predictive intelligence capabilities. Companies that want to reach massive audiences, create one-on-one relationships at scale, achieve high degrees of personalization and unify all departments occupy this space. Examples include large CPG brands, apparel companies or big box stores, who all have customers that are present on every channel, and want to be recognized as the same individual across each one.

Companies that find themselves in one quadrant but want to move to another should first evaluate the number of channels they want to be present on. That will inform first the complexity of the SOE, which will in turn inform the complexity of the SOR. If the number of channels isn't changing, that's when the company can decide how sophisticated it wants its SOR to be, and then choose the software systems accordingly.

## INTEGRATED CUSTOMER EXPERIENCE PLATFORMS: MARKET OVERVIEW

Choosing the right tools in a market with hundreds of solutions can be overwhelming. To help brands get started, we've identified a list of the top vendors that can provide integrated marketing/customer experience suites, along with a brief overview of their capabilities. While there is no doubt that customers can assemble (or build) any number of point solutions to cobble together a fully integrated customer experience cloud, for this report we've chosen to highlight the below 11 vendors, who each illustrate a range of diverse approaches to managing multi-channel customer experiences.<sup>7</sup>

### Adobe

Adobe's Marketing Cloud gets high marks for having a high degree of integration between its engagement tools, especially compared to its competitors. The core of this system is built on tight integration between Adobe's web experience tools (Experience Manager, Target) and Adobe Analytics, which had its roots as a basic web analytics program, but has evolved to become a robust system of record for tracking and responding in real-time to anonymous customer interactions across web and mobile. Rounding out these tools is Adobe Campaign for email marketing and Adobe Social for listening and publishing across social media.

While it has always been strong on the content and experience delivery side, Adobe's customer insights offerings have been limited. But this year, through its new Audience Manager tool, it has introduced new capabilities for recognizing the same customer across different devices and for marketers to evaluate, buy and integrate third-party customer data for "look-alike" targeting.

With the high degree of integration and standardized UIs across each platform, Adobe Marketing Cloud is a suitable choice for any company looking to unify its marketing operations and centrally manage content for both online and offline channels. It can provide integrated multi-channel engagement solutions for all four quadrants, but it is limited on the data side for the Omni-present quadrant, since its Analytics platform, while sophisticated enough to offer predictive intelligence and real-time engagement features, only handles anonymous customer interactions. For other known data streams, such as sales CRM and service, Adobe offers integrations with select partners.

## Experian

If Adobe is coming at the problem from the content engagement side, Experian is touting its expertise in the data management area. The Experian Marketing Suite is made up of three components: Identity Manager, Intelligence Manager and Interactions Manager. The Identity Manager is utilized to capture, clean and integrate customer data from multiple sources and link that data across channels for a single view of the customer and insights into their behavior. Experian's big selling point is its ability to enrich this first-party data with third-party data from its global consumer database, a comprehensive database that covers 700 million individuals in 270 million households, and then make that data actionable. The ability to collect, standardize and contextualize data from disparate sources makes Experian a suitable choice for a system of record in the third and fourth quadrants.

Experian also has credibility on the SOE side, with its Interactions Manager, which supports engagement across most channels, including email, mobile, web, call center, display, and paid advertising. Finally, the Intelligence Manager provides out-of-the-box reporting and analytics that support campaign and engagement optimization. Experian is continuing to enhance the offering to address new channels and incorporate predictive functionality.

## HubSpot

HubSpot made its name on promoting the idea of focusing on inbound marketing, which is getting customers to come to the brand, rather than chasing customers across multiple channels. This type of marketing is especially useful for smaller companies that cannot invest in huge marketing campaigns and have to rely more on their own content to do the heavy lifting in driving leads/engagement. Its core capabilities allow users to create, curate and measure the performance of content on owned and shared channels, while also sending emails optimized for lead generation. Although it had previously relied on integrating with companies' CRM systems, last year HubSpot launched its own CRM platform. This makes HubSpot particularly well suited to be both the system of engagement and system of record for small to mid-sized B2B companies. Its best use case is the first quadrant, but it can also provide much of the multi-channel engagement for web, email, social and paid ads needed in quadrant 2. With added integrations, HubSpot can be used as a part of larger systems in the other two quadrants.

## IBM

Big Blue receives big marks for having the most comprehensive set of solutions for the customer experience, ranging from analytics, to marketing automation and commerce. And its individual solutions in these categories consistently receive high ratings from vendor analysis reports by Forrester and Gartner. On the multi-channel engagement side, IBM has IBM Marketing Software (based on technology acquired from Unica) and IBM Marketing Cloud (based on technology acquired from Silverpop) with Digital Analytics (based on technology acquired by Coremetrics) and SPSS (predictive intelligence software) on the data management side. While IBM has made progress, and continues to invest in the integration of these tools, it has a way to go. This may be due to the fact that IBM's vision for customer experience extends beyond marketing and also includes commerce and business intelligence, and hence it is taking longer to make them work together.

IBM does however have an excellent tool for designing and analyzing customer journeys. Earlier this year, it launched Journey Designer, a new feature for its Marketing Cloud that allows for easy drag-and-drop functionality in creating virtual customer journeys, and mapping the roles played by all the teams involved in delivering the experience, even non-customer related ones such as finance. This is a key differentiator between IBM's Journey Designer, and Salesforce's similar Journey Builder (which was launched first but does not offer a finance integration.)

IBM offers great point solutions for individual channel and data management, but a limited degree of out-of-the-box integration as we move to quadrants with more complex data and channel management needs. However, a big success factor for IBM is its full service digital consultancy, IBM Interactive Experiences, which is now one of the world's largest digital agencies.<sup>8</sup> Through IE, IBM can not only help companies organize and set themselves up for unified digital experiences, it can also tailor its solutions to each client's needs, depending on whatever quadrant they might be in.



## **Marketo**

Marketo's philosophy is to excel in a very specific part of the customer engagement platform, and to provide integrations with everything else. Its core offering is an email marketing platform, but it also has added features around content planning, social engagement, web landing pages and analytics, and mobile app messaging. Through its Ad Bridge, Marketo can also integrate with external networks like Google, Facebook and LinkedIn to deliver targeted advertising to customers within its database. This makes Marketo a strong system of engagement for brands that leverage their own properties (such as landing pages and mobile apps) to trigger real-time, targeted content delivery to customers.

On the data side, pairing Marketo's marketing automation platform with a CRM platform like Salesforce is a popular combination for a lot of B2B, and small B2C companies. But despite punching above its weight and competing with industry players such as Eloqua and ExactTarget, Marketo is still perceived to not be suitable for enterprise companies, which have higher volumes of customer data and interactions. It is well suited for companies in the first quadrant, and now offers more channel engagement options for companies in the second quadrant as well. But in quadrants 3 and 4, it is limited in the channels it can manage, and it becomes more likely to be integrated with a larger system of engagement tools.

## **Oracle**

Much like Salesforce, Oracle can offer solutions for almost every customer experience function within the company, including sales, service and marketing. While it is still building out integrations between all of them, Oracle gets credit for evangelizing the vision of the customer experience cloud and the need for the entire company to organize around it. Oracle's Marketing Cloud is built on the dual marketing automation platforms Eloqua (for B2B) and Responsys (for B2C). Other components on the engagement side include Oracle Content Marketing (formerly Compendium) for content management, Maxymiser for content testing, and Oracle Social Relationship Management (SRM) for social business.

In addition to these core offerings, Oracle recently announced integrations with its Web Center for digital asset management, Service Cloud for recognizing service cases within the marketing database, and Commerce, for delivering automated content based on triggers from the e-commerce site.

Oracle's solution for the system of record is its Data Management Platform (powered by Oracle's acquisition of third-party data repository BlueKai). The DMP integrates with Responsys, Eloqua and SRM to house first-party customer data from different platforms and its ID Graph feature allows each customer to be recognized across multiple channels. DMP also allows access to third-party customer data for look-alike modelling, targeted advertising, and predicting the behavior of different audience segments across customer journeys. For enterprises looking to start from the data side of things, Oracle offers a compelling solution that fulfills much of the unified customer view requirements.

Oracle can provide robust point solutions that fulfill the tech requirements for quadrants 1, 2, and 3, although there are limited integrations as the number of channels increase. It has a strong offering on the data side which allows it to fulfill much of the SOR requirements of quadrant 4, and it continues to build integrations between its marketing, sales and service applications on the SOE side.

## **Salesforce**

Salesforce is also making a strong claim to be the company that owns the customer experience across all touchpoints. Although its claim to fame was, and continues to be its Sales Cloud (CRM) offering, Salesforce has rolled out new platforms at an impressive pace. In the last few years, it has launched Service Cloud, Community Cloud, Marketing Cloud, Analytics Cloud and most recently IoT Cloud. Valuable integrations between these platforms are still coming along, but Salesforce's vision is the right one.

Salesforce's Marketing Cloud is the starting point for its unified customer experience solutions. Within the ExactTarget marketing automation platform, users can build customer journeys using Journey Builder, and set up trigger actions that will result in automated content delivery. These trigger actions can be set up across the company website, landing pages, mobile apps, call centers and social media, encompassing a range of interactions across the sales, marketing and service channels. Journey Builder is a great tool for creating a holistic, channel-agnostic experience for the customer, with a simple drag-and-drop functionality that allows for broad, creative thinking. What Salesforce lacks on the engagement side however, is a platform for web content/mobile app content management, choosing instead to integrate with strategic partners for this capability.

Like Oracle, it can provide much of the SOR tech requirements for all four quadrants, and it continues to build out integrations and capabilities on the engagement side between sales, service and marketing.

## **SAP**

SAP has strong offerings on the data side, with its hybris marketing platform enabling the unification of structured and unstructured customer data, and creating enriched customer profiles. On top of that, hybris offers predictive intelligence features that can segment audiences, forecast campaign results and define best offers. Hybris also integrates with hybris Commerce Suite and SAP CRM. However, SAP's solutions on the engagement side are not as well defined, in fact, SAP promotes integrations with other systems of engagements, such as Adobe Marketing Cloud, which it couples with its HANA analytics and hybris data platforms.

These capabilities make SAP a consideration on the SOR side for all four quadrants with its integration capabilities, and also a player for quadrant 4 with its features for integrating marketing with commerce operations.

## **SAS**

SAS gets recognition on the basis of its highly rated Customer Intelligence Platform. The CI platform is designed to store data from multiple digital sources, including social, mobile and e-commerce. The SAS platform allows for a high degree of granularity in targeting and optimization, and can be used for extremely sophisticated predictive modeling. However, its price can be prohibitive for companies, especially those that don't require a very complex data management system. Like SAP, SAS can be considered for the SOR in all the quadrants, especially in the more sophisticated requirements of real-time decisioning and other predictive analytics efforts.

## **Sitecore**

Sitecore made its name as a web content management solution, but it has steadily built more and more content engagement capabilities in addition to its core content management offering. Sitecore now offers many of the same engagement platforms as Adobe Marketing Cloud, including web and mobile experience management/optimization, commerce, email and social marketing, and even an integration for producing personalized print experiences. On the data side, there is the Sitecore Experience Database, which, in addition to web analytics, can store data from CRM, service platforms and commerce to create unique, comprehensive profiles of customers. Despite offering solutions in both the experience and data platforms, Sitecore has to battle the perception that it is a specialist solution for content management, which it plans to do by building out more data analysis and predictive intelligence features.

Similar to Adobe, Sitecore can be considered on the SOE side for all the quadrants, and requires integrations on the more complex data side of things as we move into quadrants 3 and 4.

## Sprinklr

Up until this year, Sprinklr was thought of as a social media marketing platform, albeit a very comprehensive one with tools for listening, publishing, and advertising across social channels. However, it has recently been very vocal about the concept of providing a unified customer experience across multiple channels, and using social for much more than just marketing. To that end, it launched its Experience Cloud earlier this year, which offered engagement solutions outside of social, including content planning and web publishing. On the data side, Sprinklr offers an integration with SAP's hybris for a unified customer view across its channels and predictive analytics features.

Sprinklr makes sense as a system of engagement for companies who want to start unifying customer experiences within social media first. It's especially suited for large CPG companies who might sell primarily through retailers, but use social as their main form of real-time customer engagement and listening. The platform also enables social to be used by multiple business units and locations that need to manage a large numbers of brand touchpoints, allowing the brand to reach audiences at scale. This makes Sprinklr a consideration for companies in quadrants 1 and 3, where not as many channels need to be managed and it can be integrated with bigger data platforms to handle higher levels of complexity. In quadrants 2 and 4, Sprinklr is capable of owning all social media operations across sales, service and marketing, and can integrate with other channel solutions on the engagement side, as part of a suite.

## ENDNOTES

- <sup>1</sup> "Global Insights on Succeeding in The Customer Experience Era" Oracle, February 2013 <http://www.oracle.com/us/corporate/press/1903222>.
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- <sup>4</sup> Rishi Bhandari, Marc Singer, and Hiek van der Scheer, "Using marketing analytics to drive superior growth" McKinsey & Company, June 2014 [http://www.mckinsey.com/insights/marketing\\_sales/using\\_marketing\\_analytics\\_to\\_drive\\_superior\\_growth](http://www.mckinsey.com/insights/marketing_sales/using_marketing_analytics_to_drive_superior_growth).
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- <sup>6</sup> "Marketing Got Complicated: Challenges (and Opportunities) for Marketers at Mid-Sized Companies" DNN Corp. 2014 <http://www.dnnsoftware.com/resources/whitepapers/marketing-got-complicated-challenges-and-opportunities-for-marketers-at-mid-sized-companies/view/whitepaper>.
- <sup>7</sup> Each vendor was selected on the basis of its capability in providing at least one aspect of the customer experience cloud (such as a SOE or SOR) and the ability to integrate with solutions it does not provide. Another factor was the demonstration of vision and initiative around building a unified, multi-channel customer experience.
- <sup>8</sup> Bradley Johnson, "Revenue, Staffing, Stocks and Digital Show Growth for Agencies in 2014 Report" Advertising Age, April 27, 2014 <http://adage.com/article/agency-news/2014-agency-report-revenue-staffing-stocks-digital/292849/>.

## METHODOLOGY

This report is based on a series of in-depth interviews and briefings conducted in the period between July and September 2015.

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Brian Halligan, CEO, **HubSpot**

Bryan Brown, Vice President of Product Strategy at **Silverpop (IBM Marketing Cloud)**

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# About Us



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Omar Akhtar is the Managing Editor for the research team at Altimeter, A Prophet Company where he oversees the editorial process behind all of Altimeter's publications, including its research reports, daily blog and multimedia content. In addition, he conducts and publishes research in the area of marketing/customer experience technology. Previously he was the editor-in-chief of the marketing tech blog *The Hub*, and a technology and finance reporter for *Fortune*.



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