Getting Started with Real-time Customer Engagement

STRETCH

Get your house in order. Bring data in from any source needed. After the data is merged and cleansed, load it to a marketing database where you can access it for targeting and personalization. Use this data to better understand customers.

Data governance and continuous enhancement of data are essential to long-term success. Consider establishing a Data Governance function inclusive of the business and IT to help with data quality efforts. The accuracy and robustness of data will define the boundaries for what you can do in real-time customer engagement.

ACTIONS
- ☐ **Data integration**
- ☐ **Data cleansing**
- ☐ **Data augmentation**
- ☐ **Integration with customer engagement tools**
- ☐ **Customer understanding (demographic, firmographic, product lifecycle)**

WALK

Start with low hanging opportunities to improve dynamic outbound communications. Use available data (from social data, clickstream data, anonymous browsing, POS, loyalty and CRM) to execute personalized outbound campaigns. Incorporate trigger marketing tactics to layer implicit and explicit data into customer engagement.

ACTIONS
- ☐ **Dynamic personalization in outbound channels**
- ☐ **Segmentation**
- ☐ **Business rules to suppress message volume and offer repetition.**
- ☐ **Cart abandonment campaigns**
- ☐ **Collect customer insights**

EXECUTION
- ☐ **Focus on real-time marketing via single channel execution – learn and test.**
- ☐ **Consider outbound newsjacking techniques and use these to collect information about what makes your target audience tick.**
- ☐ **Incorporate trigger marketing techniques over 1 or 2 channels.**

TECHNOLOGIES TO CONSIDER
- ☐ **Customer Data Platforms**
- ☐ **Campaign Management**
- ☐ **Email Service Providers**
- ☐ **Offline BI Tools**

JOG

Progress real-time tactics from single chan- nel to multichannel and layer in optimization techniques. Try real-time inbound offers and experiences that engage customers on the web, call center, or in-store. Trigger messaging and remarketing through email, SMS, or mobile app to tie in real-time outbound channels.

ACTIONS
- ☐ **Multi-channel campaigns (>2)**
- ☐ **Establish a customer preference center**
- ☐ **Retargeting**
- ☐ **Event-based trigger campaigns**
- ☐ **Dynamic personalization via inbound channels**

EXECUTION
- ☐ **Focus on incorporating more than one channel in an orchestrated way.**
- ☐ **Continue to analyze the cross-channel customer journey and define gaps beyond your core channels**
- ☐ **Consider divesting of legacy tools that limit or impede real-time messaging**

TECHNOLOGIES TO CONSIDER
- ☐ **eCommerce and CMS**
- ☐ **Next-Best-Action/Offer**
- ☐ **Ad Tech**
- ☐ **Web Analytics**

RUN

Look for ways to optimize inbound and outbound communications and start shaping the ideal customer journey. Focus on a true orchestrated omnichannel journey – next best offer, next best channel and a consistent message across any channel. Take advantage of machine learning tactics like automated recommendations, propensity to buy models or customer scorecards.

ACTIONS
- ☐ **Coordinated inbound & outbound**
- ☐ **Embrace machine learning**
- ☐ **Closed-loop measurement**
- ☐ **Automate customer lifetime value scoring**
- ☐ **Adopt an attribution model for continuous improvement**

EXECUTION
- ☐ **Embrace advanced modeling and algorithms.**
- ☐ **Leverage out-of-the box tools to deliver turnkey modeling.**
- ☐ **Simplicity equals scale in real-time messaging**
- ☐ **Focus on small tweaks that have incremental gain**

TECHNOLOGIES TO CONSIDER
- ☐ **Customer Engagement Hubs**
- ☐ **Machine Learning**
- ☐ **Optimizers**
- ☐ **Product Recommendation Engine**

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