Munvo

Paving the Way to Omnichannel Personalization

Your MarTech Roadmap

Bridging the expectations gap

Nearly all companies today, regardless of industry, expect to compete chiefly on customer experience. Why? Because customers are demanding more from brands: increasingly personalized communications, highly relevant offers, and a greater desire to be seen and heard. Creating a better experience can grow conversions and ultimately increase trust and brand loyalty.

However, many companies are finding it difficult to orchestrate an effective cross-channel customer journey due to siloed data from disparate systems, outdated batch processes, and limited budgets. And despite the ubiquity of digital channels and customers' propensity to use them, many organizations have yet to address connecting the online and offline worlds, understanding customer preferences, and delivering the right message at the right time.

While some organizations have chosen a customer data platform (CDP) to solve these challenges, a CDP is often unnecessary. Deploying a CDP typically involves migrating data from a company's owned systems to the cloud of the CDP provider, which can lead to complex technical issues that may actually prevent omnichannel journeys in real time.

Here we highlight **four key challenges** in achieving personalized, omnichannel experiences and provide a high-level roadmap to overcome each one.

Creating omnichannel experiences that bridge online and offline worlds

Knowing your customers at a granular level to enable hyper-personalization

Delivering the right message at the right time at scale

Modernizing and optimizing marketing processes

Follow along to get the most out of your marketing platform, so you can transform the customer experience from dissatisfaction to deeper engagement.

Are you connecting online and offline worlds?

Disjointed. **That's how some customers would describe their brand experiences, from businesses that have lagged in modernizing their approach to customer interaction management.**

Think of the bank customer who visits a branch whose officers don't realize they've already started an online mortgage application. Or a retail shopper who receives a promotional offer online only to find that it can't be redeemed in-store – dealing a real blow to customer satisfaction.

Marketers need to meet customers where they are – whether that's online or off. And that means transitioning away from solely focusing on the legacy channels of email and direct mail, using a "spray and pray" method of reaching "the masses," when personalized targeting offers a clear competitive advantage.

Instead, marketers need to embrace the full range of available digital channels and integrate them with offline channels.

By developing this omnichannel approach to marketing planning and deployment, marketers are in a better position to deliver:

- Real-time channel activations
- Consistent offers between channels
- Automated segmentation and deployment
- Response integration for channel performance, attribution and insights
- Campaign performance metrics using real-time dashboards

Of course, that's easier said than done. Disparate systems and siloed data present an ongoing challenge to creating an omnichannel experience.

For one, these systems are difficult to manage, often having separate marketing teams for planning and delivery without coordination. Moreover, limited budgets and the technical debt incurred by managing separate systems do not allow for efficient integration.

Indeed, complex solution stacks with multiple applications from multiple vendors require expertise – for each individual application and to lead a concerted effort across IT to bring together a complete solution.

Roadmap to creating omnichannel experiences

01 Expand marketing planning and processes to include digital channels, from social to website management to app push notifications.

02 Start with simple offers spanning multiple channels, including online and offline.

03 Ensure solutions are API-driven, can activate segments to channels programmatically, and can integrate ingested information/events from external channels.

A single solution such as **SAS Customer Intelligence 360** can provide all this functionality – segmentation, offer management, journey creation, channel integration and activation, and response management – to streamline coordination and orchestration among teams and systems.

Automating offline processes to transform customer experience

Challenge

ConnectiveRx, a technology company with biomedical manufacturers, sought to improve the patient experience and reduce the wait and bureaucracy around access to therapeutics. To help do this, they wanted to eliminate the manual, paper-based process around co-pay registration and make it fully automated through the use of novel channels.

Solution

Munvo integrated our in-house solution, SMS Gateway, with the client's marketing automation software suite to enable real-time client co-pay registration – including consent capture, questionnaires, and real-time fulfillment from internal systems – via SMS. ConnectiveRx gained bi-directional conversational capabilities to improve the customer experience.

Outcomes

- Reduced co-pay registration and insurance card delivery down from days/weeks to a matter of minutes
- Delivered as many as 200K SMS conversations per month, with an opt-out rate of only 0.02%
- SMS Gateway won the 2021 SAS Excellence in Innovation Award

How well do you know your customer?

To determine which offer or message a customer is most likely to respond to for increased lift, first you need to know:

- **What the customer actually wants**

- **When they want it**

- **How it should be delivered**

In other words, customer insights are needed *in context* of their complete journey. That's what is meant by a 360-degree customer view. No matter what channel customers show up in, you can understand their preferences and behaviors to create highly personalized, next-best-action use cases.

By integrating disparate systems, achieving this in-depth knowledge is possible. The right data environment allows organizations to consolidate first- and third-party data to create detailed customer pictures, preferably in real time.
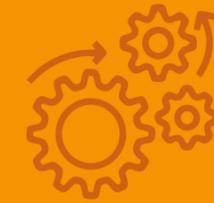
The right data model should:

Present a unified identity for individuals across all disparate systems and lines of business

Collect a unified contact history that integrates channel response data with transactional data

Make all channel interactions easily usable and digestible for offer prioritization

SAS Customer Intelligence 360's hybrid architecture enables easy connections to any chosen data environment, enabling you to use data where it resides, without the need for lift and shift. Leveraging this data environment allows organizations to use existing investments, control privacy and speed time to value – while also providing different areas of the business with the same unified, analytics-ready customer profile and insights.

Roadmap to developing a 360° customer view

01 Create a single source of truth for customer data. If you don't have a customer/marketing-centric datamart (CMDM), start small: Create a star schema, or multi-dimensional data model, around a base customer profile table.

02 As part of this effort, build out a unified contact and response history to orchestrate messaging and eliminate rejected offers from being presented to customers. Be intentional about using customer data. Bring in additional data as it is needed to fulfill use cases. Work to ensure data security: using customer data carries the risks of misuse or security breaches.

03 Customers are more willing to share data if it is being used for activities that bring them value – prioritize those personalization use cases that can deepen engagement between the customer and your brand channels.

CASE STUDY
Unifying customer identities to streamline targeting

Challenge
An automobile manufacturer did not have a clear view of mailable audience volumes or a clear source of truth across marketing data sources. The company suspected a misalignment between its current data lake and activation tool, resulting in unreliable reporting.

Solution
Munvo developed a new data warehouse and a new marketing datamart that unified marketing data sources into a single repository, allowing for a centralized view of customers, structured data necessary for reporting and metrics, and easy management of emails.
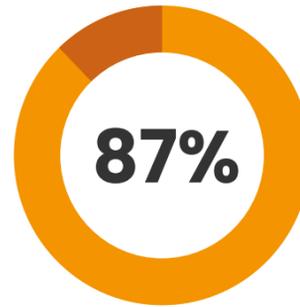
Outcomes
- Clear understanding of target audience volumes
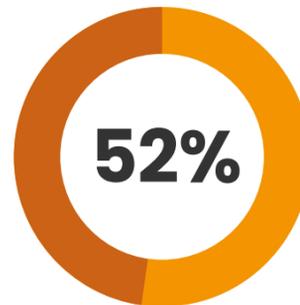- Increased confidence in quality of customer data

Can you deliver the right message at the right time at scale?

When it comes to relevant, personalized communication, there is a disconnect between customer expectations and brand performance.

87%

87 percent of brands feel they deliver superb customer experiences. But only 11 percent of their customers agree.[1]

52%

Similarly, 52 percent of customers expect offers to always be personalized.
But 66 percent say they're still generally not treated as an individual.[2]

There could be several reasons why customers are dissatisfied with their level of personalization. On one hand, marketers may not truly understand them, unable to unearth the types of granular data needed for hyper-personalization.

On the other hand, it could be that marketing platforms aren't supplying the right type of insight. Creating consistent customer experiences and orchestrating them across channels in real time at scale requires the right underlying processes and models. Channels must be connected and customer profiles updated in real time to deliver this type of consistent experience.

That's why a CDP often comes up short in the drive for hyper-personalization. You need the AI and machine learning techniques built into more powerful solutions to provide real-time decisions on next-best message and drive deeper insights into customers and segments. Then, using what you learn about your customers, you can adjust marketing tactics to create ideal product mix offers or determine the best time for follow-up communications.

These expectation mismatches could also be the result of deficiencies in a platform's ability to automate. Human intervention is inefficient and costly, potentially missing the mark when the number of targets is vast. On the other hand, a solution like SAS Customer Intelligence 360 enables marketing, sales and service teams to set up, automate and track activities in a repeatable fashion from a single omnichannel marketing hub. Minimizing manual processes, teams can easily define target segments, prioritize selection rules, automatically execute campaigns, and track what's performing and what's not using intuitive reporting dashboards.

[1]IDC. "Bridging the Gap Between the Experience Customers Want and the Experience You Provide." January 2022.

[2]Salesforce. "State of the Connected Customer." 2020.

Roadmap to communicating effectively at scale

01 Begin with easily deterministic behavior-based personalization and behavior-based segment discovery.

02 Use modelling to determine propensity and lift models, and then leverage these models for pre-determined offer eligibility and prioritization.

03 Pre-defined business logic and batch modelling available in SAS Customer Intelligence 360 can deliver personalized experiences and orchestrate journeys in real time.

04 For complex real-time use cases, consider implementing a tool like SAS Intelligent Decisioning that can integrate with Customer Intelligence 360 and customer touchpoints and channels.

CASE STUDY
Opening new opportunities for personalization

Challenge
A leading telecommunications provider lacked expert resources to build effective and efficient Real-Time Decisioning and Marketing (RTDM) campaigns. The company needed a solution that streamlined campaign creation, enhanced targeting capabilities, and maintained consistent quality.

Solution
After establishing a documentation process that fostered better collaboration among marketing teams, Munvo developed custom scripts to align fulfillment processes with RTDM objectives and enabled additional channels for real-time use cases. This expansion – including social media, messaging apps, and personalized content delivery systems – opened up new opportunities for real-time interactions and personalized messaging.

Outcomes
- Quicker, more efficient development of real-time decision flows and campaigns
- Enablement of more retail stores with the capability to present personalized offers
- Expanded channels for real-time use cases

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Are your processes up to the task?

An organization's personalization efforts are only as good as its underlying processes.

That's because creating a consistent brand experience that leverages customer insights requires a high degree of collaboration and coordination. For complex multi-channel campaigns, development and deployment needs a range of disparate skills from several teams:

Channel-specific teams
(e.g., web and mobile developers)

Data teams
(e.g., data scientists for modelling, segmentation teams, analytics and dashboarding for attribution and reporting)

Brand and product teams

Creative development and testing teams

When you can align these different teams around a common marketing enablement infrastructure, you're able to integrate planning activities with channel execution – including web, mobile and email delivery. By harnessing the collective power of people, processes and technology, marketers can better coordinate timing, messaging and offers to execute more impactful campaigns that get to market quicker.

What's more, modernizing marketing processes leads to better marketing efficiency, effectiveness, and increases in MROI.

From marketing strategy development to journey activation to post-campaign analysis, comprehensively managing all marketing processes across your business allows you to adapt quickly and gain visibility into time frames, costs, overruns and performance.

Centrally manage and streamline your marketing with a solution such as SAS Customer Intelligence 360 that can help track the full campaign development process, provide approval-based workflows, allow for budget and finance tracking, and align resources automatically through scheduling and API-based triggers.

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SAS® Customer Intelligence

Roadmap to streamlining processes

01 Review marketing transformation capabilities and processes to identify areas for better coordination and centralized management.

02 Track and plan program and campaign-level activities throughout the year, including budgeting and resource planning.

03 Track campaign progress and coordinate disparate activities such as data analytics, journey creation, creative design and approvals using a campaign planning and workflow management tool.

Aligning people and processes to ensure customer-centricity

Challenge

The marketing and sales resources of a major broadband company were decentralized, resulting in inefficiencies and minimal collaboration. The company needed to consolidate customer data in order to migrate from outbound list campaigns to journey-based marketing, while streamlining the campaign management process.

Solution

Munvo's three-phase plan developed a customized roadmap that strategically grew revenue by building on a strong baseline. We defined and standardized campaign management tools and processes along with the appropriate training and support, and built, deployed and optimized new customer journeys whose results could be measured through real-time dashboards.

Outcomes

- Elevated ROI through optimized marketing and sales processes – and increased customer-centricity
- Established a comprehensive end-to-end campaign management system that leverages people, process and technology
- Shortened time-to-market through effective resource management, change management and tool utilization

Getting more out of your marketing platform

Munvo can help align your marketing processes and marketing technology to better connect with your customers and maximize the impact of your marketing budget.

We start with a marketing modernization readiness assessment, where we can show you how to leverage tools like SAS Customer Intelligence 360, powered by Intel, to turn marketing business drivers and use cases into an actionable roadmap that goes beyond the first steps featured here. Munvo is a SAS focus partner in Marketing and Customer Intelligence Solutions accredited with a specialization badge in SAS Customer Intelligence 360.

Working with Munvo means more than leveraging our experience in marketing platform implementation and integration, data collection, customer journeys, real-time decisioning and insight activation. We also understand that adopting new technologies and processes can be a resource-intensive and complex undertaking that can affect your entire organization.

That's why we can tailor an operational and technical support plan for your marketing and IT teams. This could include assembling a personalized change plan for your organization that incorporates everything from data dependencies to reporting to customized personnel training. Our team can even quickly integrate and supplement your current staff.

Intel Inside. Successful analytics initiatives require tight alignment between hardware and software in the hands of skilled technologists and strategists. That's why the ongoing collaboration between SAS and Intel is so important for clients. Together, we know how to connect all the dots on analytics strategies to provide practical solutions that deliver real, measurable results – at any scale.

SAS Customer Intelligence 360
is a fully integrated marketing suite capable of transforming the customer experience and your view of your customers. This powerful tool from the global leader in analytics features a full range of capabilities, including identity resolution, a unified data model, direct marketing, real-time personalization, and omnichannel customer journeys with triggered actions from web, mobile and external channels.

Let's start a conversation

Overcoming the challenges of creating smarter, more personalized customer journeys starts with asking the right questions.

01 What can you do to orchestrate omnichannel customer journeys with ease?

02 How can you improve real-time decision making?

03 How can you use marketing resources and budgets more effectively?

04 What will it take to integrate your current solutions into a platform such as SAS Customer Intelligence 360?

Munvo is here to work closely with you as a trusted advisor to answer all these questions. We take your strategy and goals, build a roadmap, and help you with everything from implementation to ongoing training for your team. Contact us to schedule a consultation where we can listen to you and help you begin to maximize your MarTech investment.

Learn more at munvo.com/contact-us/

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