



EXPERIENCE ESSENTIALS

# Build your business on a solid data foundation.



EXPERIENCE  
ESSENTIALS  
▲ Data

# Just the basics

**W**riting out a daily to-do list is different than writing a magazine article. You keep it to the essentials—short phrases, simple words, and maybe a quick sketch. You eliminate the excess so you can get down to business.

There is a similar basics-only approach to becoming an experience business. In our multi-part Experience Essential series, we examine the basics of customer experience (CX)—the building blocks you'll want to have in place to sustain customer experience management (CXM) success.

## The data dilemma

Does this sound familiar? As a marketer, Carmen knows that to better serve her customers she needs to know them. She wants to know what interests them, understand their needs, and of course figure out what gets them to act. She knows this comes from collecting, analyzing, and understanding the data that her customers provide. Thankfully, like most businesses, her organization has been collecting data for a while. They have data in their CRM. They

## The customer experience

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Customer experience management (CXM) is the leading edge of marketing, sales, and branding today. It goes beyond CRM, which shows customers in the past. CXM shows what customers need right now, and in the future, and delivers it in real time, at scale, and across every channel.

have data from their website as well as data from email campaigns. Some data comes from the sales organization. Still more comes from social media platforms and her company's app.



Over time, the data sources continue to grow and are stored in different ways and in different systems. Carmen knows that the same customer, Customer A, is accounted for in the CRM, and is likely using the website, opening some emails, using their app, and interacting on social media, but there is nothing tying that customer's actions together—no way to know the difference between Customer A across channels versus customers B, C, and D.

After working with her IT team, Carmen made some progress by getting the data sets funneling into a single repository. But the data is still siloed. It comes in from *different* systems measuring *different* indicators in *different* ways. With all of this data, her business still can't harmonize the insights or build and update unique customer profiles, so they ultimately can't deliver highly personalized experiences to each customer.

This isn't a unique situation. Many businesses—large and small, including some of the most tech-savvy—are still trying to get their data to drive them forward. They already have data. They've been collecting it for ages. But it's spread out, siloed, and disorganized. They're not starting from square one, but they still need to turn the corner from data collection and general analysis to precise data science, building individual customer profiles and delivering personalized experiences to every customer.

# The download on data management

**D**ata is the fuel for the CXM machine. But it's not just about gathering all data and hoping the whole mass, viewed by few, will create a path to amazing customer experiences. In the same way that you don't pour crude oil into a car's gas tank, you must refine your data. Organize it. And share it with those who can directly affect the experience.

So it starts with bringing together the right data—sets of data that may be separated from each other by silos like interactional, transactional, financial, operational, and third-party. This is where a CXM platform comes in. With your data gathered in one place, you standardize it so it's using the same



definitions across systems. Then make it available for activation across all customer touchpoints. This organized and networked approach to data encourages good customer experiences and builds relationships with customers that improve and grow in the long term.

You also want your business to establish a solid data governance plan. Data governance is the framework that your organization uses to agree upon how data is used, who manages it, and who can make decisions about it. This governance keeps your organization on the same page, as you understand which key performance indicators (KPIs) tell the right story and what data helps you identify your audience. Additionally, governance includes your business's data privacy policy. Be sure as you assemble, keep, and use unified customer profiles that you're accounting for proper privacy and legal compliance across all countries and regions where you do business.

Additionally, you want to democratize your data—that is, share your data. It's easy for data to be collected and even analyzed, but sometimes that's where it stops. So, the sharing of data needs to be intentional—baked into the budget, software, and processes of your organization.

Finally, you want the collection, governance, and sharing of data to help identify your customer. If your data is being gathered and analyzed in one platform, it builds a comprehensive view of your customer. This unified profile ultimately helps you:



### **Know your audience**

Direct your experience to detailed attributes that predict your customers' affinities, preferences, and behaviors—not to arbitrary demographics. When done well, your customers will identify with the story you curate and take similar actions in the customer journey.



### **Map their journey**

Once the audience is defined, reach out to them as a segment through email, social media, or any other channel. You can also learn from each interaction how to improve their experience over time.



### **Personalize their experience**

Personalization is less about special offers and more about creating the right experience. But personalizing manually is too time consuming, so let automated technology like artificial intelligence, chatbots, virtual reality, and augmented reality curate more personalized experiences for individual customers.



### **Go find more customers like them and repeat**

Once you've identified an audience and dialed in the right experience, you've created not only long-term loyalty from them, but a template for future audiences. Analyze your data and find similar audiences or ways to create sub-audiences with the existing audience to share even more customized experiences.

Data will be the starting point of creating the right customer experiences. Get organized, understand what data you need to focus on, and get it to the right people. Then let it inform let it inform you about where your customers have been, where they are at the real-time moment, and where they're headed. That way you can be there with the right experience when they arrive.

# The main players

As you consider your organization in regard to data management, understand the roles of those involved. This will help you set up an ecosystem where the right data is being gathered, analyzed, shared, and acted upon.



## Chief information officer

aka: CIO

Functional role: the gatekeeper

CIOs understand what technology is out there and how to procure it, and they oversee its implementation. They also have a unique perspective on the technology needs for their organization. The CIO knows that piecing together legacy software to create a unified customer view is painful and ineffective. This positions the CIO as a core advocate and collaborator for strategic and organized customer experience management.



## Data analyst

aka: data scientist, data architect

Functional role: the architect

Data is only as valuable as the insight you can get from it. Your data scientists and analysts are the ones who gather large amounts of data, determine what data matters, and define the KPIs. By stitching the right data sets together, they show the up-to-the-moment lay of the land to the rest of the business. They help turn insights into an actionable plan for the rest of the enterprise.



## Chief marketing officer

aka: CMO

Functional role: the central command

In the CMO.com article [Digital Transformation 2.0: Customer Experience Management](#), Gartner Analyst Augie Ray states that the role of CXM leader is still up for grabs in many organizations, though CMOs are well-positioned to own it. Many data insights pass through the marketing department and then turn into CX-related action. The CMO has close organizational proximity to the CIO, the CEO, and other C-level executives, as well as the marketing boots on the ground. Because of this, the CMO is in prime position to relay insights and instruction upward, downward, and laterally across the organization.



## Marketing practitioner

aka: Any title of anyone directly creating customer experiences

Functional role: the front line

The marketing practitioner is where the rubber meets the road. These are the employees who are making daily decisions that shape the actual customer experience in all channels, at all levels of the sales funnel, every day. All of the technology the CIO has assembled, the data collected and interpreted by the analysts, and the overall game plan directed by the CMO all funnel directly to these people who turn all of that investment into experiences—whether good or bad.



# See where you stand

As you consider your organization's data in the context of CX, here are some questions to ask and further insight to determine your next steps and areas to strengthen.

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## Data governance

Survey those who play a role in the use of your data.

- Ask them where they feel your organization is strong in the collection, analysis, and sharing of data. Where could you get better?
- Do the collectors of data know who would be interested in the information?
- Do those who could use data insights know where to get them?
- What KPIs should your whole business align around?
- Could there be better dashboards or other visualizations that help decision-makers and marketing practitioners more quickly and effectively improve CX?

For additional perspective on effective governance, read our blog post [\*Data Governance: The Key to Building Consistent, Outstanding Digital Experiences.\*](#)

## Analytics audit

- Do you have access to real-time insights?
- Who controls the distribution of analytic insights?
- Using data insights, can you target and automate relevant, personalized experiences?

As you think about your analytics effectiveness and maturity, read our post [It's Time For Your Analytics to Grow Up](#).

## Actionable analytics

- Is your organization data-driven?
- Are your CIO, CMO, and data scientists aligned on data-driven decision making?

Read our blog post [CIOs and Data Scientists](#) to get ideas about how to better align your organizations data specialists.

## Unified profiles

- Are you creating unified customer profiles?
- Are the profiles complete? Real-time?
- Are you accounting for proper customer privacy and compliance as you assemble profiles?

Learn more about identifying and acting on the best audiences. Read [Create the Best Commerce Experiences Possible by Understanding Your Audience](#).

## Sources

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