

CXForward

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Unleash the power of data

The marketer's guide to
actionable insights

"You must understand the importance of the data that feeds the system to make good decisions, and make sure you have a mechanism in place to report the results of your program."

Key Takeaways

- The primary reason marketers struggle to reach their target audience
- Why data capture/collection isn't enough
- How to reduce reliance on third-party cookies and avoid deprecation
- The critical difference between real-time and live-time data
- Why CDH implementations take so long

When clients are considering a centralized decision process in their company, they always ask, "What do you wish you knew before you got started?" says Kelly Holmstrom, SVP of Customer Experience at CXForward, a top systems integrator and trainer for Pega Customer Decision Hub (CDH) implementations. She says the number one answer is, "You must understand the importance of the data that feeds the system to make good decisions, and make sure you have a mechanism in place to report the results of your program."

Holmstrom continues, "Often, the first hurdle we encounter is with the data. Either clients have too much of it and don't know what to do with it, it's in a format that's unusable, or they don't have data feeds configured properly, if at all. Often, there's a data hygiene challenge, where they can't trust the data that's available. This causes major disruption to the roadmap and project schedule. One of the worst things that can happen to decisioning implementation projects, specifically with Pega CDH, is for it to be put on pause while a new data project is hastily stood up. We call this the "let's fix the data" project, and it can take 6-18 months. The key to keeping implementation projects on track is determining the data points that are important to your business and your customers, and making sure those elements are captured and available for use within the decisioning process."

The Current State of Data

CXForward understands the challenges marketers face in connecting with their target audience effectively. Gathering valuable insights about digital visitors is crucial for successful marketing efforts. However, the landscape of data strategies is rapidly changing. Marketers encounter obstacles in accessing specific data because of factors like cookie deprecation, i.e. phasing out of third-party cookies, cookie blockers such as Apple's Intelligent Tracking Prevention (ITP), and stringent privacy regulations.

In light of impending cookie deprecation, many large-scale enterprises have been proactively reshaping their data strategies to adapt. One popular approach is the adoption of Customer Data Platforms (CDPs) to address this issue. Unfortunately, most CDPs are slow to implement and don't provide real-time data, and for marketing efforts to be truly effective, data needs to be activated instantly.

Data and Decisioning

Many companies still need to decrease their reliance on third-party data. Some brands seem to be holding out hope for further delays, hesitant to make any changes. However, the phasing out of third-party cookies carries far-reaching implications, affecting email marketing, personalized digital experiences, and the use of tracking analytics and data.

Without a shift towards prioritizing first-party data collection, organizations risk facing significant challenges. Marketing leaders should bring together their data and information teams and develop a plan for transitioning to a first-party data-centric approach. It's crucial to find a solution that minimizes friction, eliminates the need for excessive tagging, and offers actionable insights through reliable first-party data.

Many companies have invested a considerable amount of time and money (12-24 months isn't uncommon) putting a CDP in place that ultimately doesn't solve their problem.

Brands now recognize that a comprehensive data collection plan must include a proactive and robust data activation strategy. It's not enough to simply understand consumer preferences or their journeys; this insight must be leveraged to deliver personalized experiences in real time. Subpar experiences can lead to higher opt-out rates and lower email open rates, which should be a concern for every marketer. Once a customer opts out, the likelihood of them re-engaging is slim-to-none.

We're committed to guiding brands in developing effective data strategies that not only adapt to industry changes, but also drive meaningful business outcomes.

Understanding the Broader Data Problem

To get to the solution, marketers need to fully understand the problem. To do that, let's go back to the basics.

What's the difference between real time and live time?

When one hears the term real-time, they instinctively think it refers to what's happening now or in that very moment. While it should, we've found that vendors use the term loosely when it comes to data. Typically, vendors refer to real time as data capture – not data connection, delivery, or activation. Real time also differs in definition of timing, sometimes referring to minutes, other times hours, or even the next day. They might capture the data in real time, but if your marketing systems don't receive it until the next day, it's old and effectively useless.

Put it in Practice

If someone is looking at buying a red shirt for Valentine's Day, and they don't start looking until February 12th; they'll need to find something within the next 24 hours and pay for overnight shipping so they have it to wear on Valentine's Day. If that insight isn't actioned instantly, they may not only lose a sale, but could be advertising red shirts to the customer after Valentine's Day. That's a recipe for a disjointed customer experience – one that leaves the customer feeling misunderstood! If the data was collected in real time, but didn't land in the system for 24 hours, the vendor still calls this real time – even though it's not.

'Live-time data' means the information is captured AND delivered for use in real time across business systems. This enables the brand to interact and influence customer experience while a consumer is still actively engaged with the brand. Using the example above, when they type in "red shirt", that data is captured and sent to their systems immediately, so most importantly, it can be actioned as it's happening.

Speed and Data Engine Health

Speed is vital for the overall health of any marketing data engine. Marketers rely on data to make informed decisions – the speed at which data is captured, contextualized, and activated is critical for their success – the longer it takes to get data, the less relevant it is.

For instance, consider a marketer monitoring social media reactions to a new product launch. If there's a delay in getting this data, the sentiment may have already changed by the time it's analyzed, making it obsolete. Receiving contextualized data in-the-moment empowers marketers to understand the meaning and relevance of the data in live time.

Getting that data in real time doesn't help if your systems can't activate it. Speed-to-action is equally vital because it enables marketers to action the data in live time and deliver personalization in-the-moment – while visitors are still engaging on the site. If a marketer identifies a behavioral signal, they can quickly adjust messaging or targeting to capitalize on the opportunity immediately. If a marketer identifies a behavioral signal, they can quickly adjust messaging or targeting to capitalize on the opportunity immediately.

By optimizing speed at each stage of the data lifecycle, marketers can make better decisions, respond to market trends faster, and ultimately drive better business outcomes. Who doesn't want that?

Getting the Right Data

Context and intent are invaluable in marketing, and the right data provides this insight. When a brand understands what a customer wants, they can advertise to them more effectively **and** get better results.

To determine intent, brands need all the data – gaps in their data from a mislabeled or missed tagged, or latent systems, do a disservice to the brand.

The right data empowers marketers to:

- Understand consumer needs
- Identify marketing trends and opportunities
- Enhance targeted marketing campaigns
- Personalize product recommendations and offers
- Improve customer experience and satisfaction

The right data is crucial to deliver the right message, to the right person, at the right time.

The Right Data Feeds Accurate Identity

A modern data capture system gathers and examines customer information from various sources like mobile, online, and offline interactions and makes it available in milliseconds. This is referred to as live-time data. This timely context helps us to instantly build a complete and accurate profile of each person, including their preferences, actions, and intentions. To ensure precise customer identification, brands also need a data capture system that links data and identity across different channels, devices, and domains. Otherwise, they'll end up with multiple IDs for the same person.

Solving for anonymous visitors is crucial, as nearly 98% of website visitors remain unknown. Focusing only on authenticated or logged-in users means missing out on 98% of potential revenue opportunities.

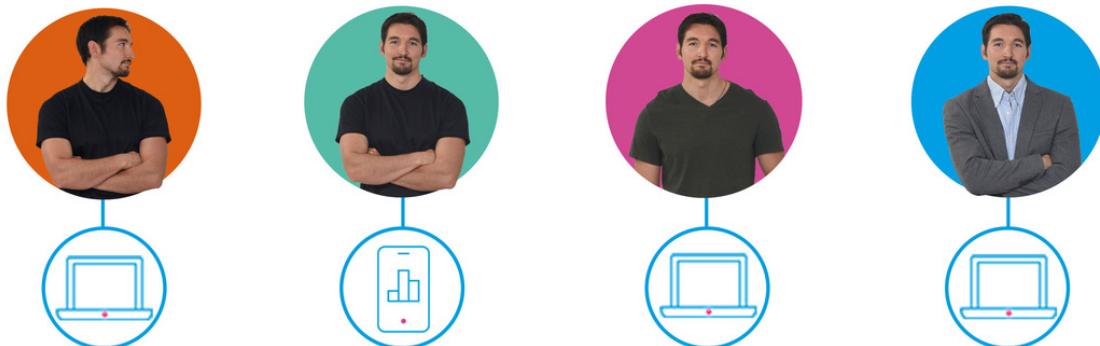
Enhancing the brand's MarTech stack with a modern data capture platform delivers more efficient marketing. Marketers gain a comprehensive understanding of the customer and can target them more effectively. This comprehensive view of the customer journey enables hyper-personalization, resulting in a highly relevant consumer experience.

Live-time data provides brands with immediate insights. We've found that Celebrus is the only platform that delivers this contextualized data in milliseconds. Celebrus offers a complete 360-degree view of every consumer and their journey in true live time.

Traditional CDPs don't have the capability to stitch identity across time, device, channel, or domain in live time. They assign multiple IDs to the same individual because they can't maintain identity once the visitor leaves the site, switches devices, or logs out. This makes it impossible to market effectively to the specific needs of each consumer. Additionally, the data is cleared after only seven days, causing marketers to lose valuable historical insights.

In case a consumer opts out completely, Celebrus offers CX Vault, leveraging cutting-edge technology that uses machine learning to generate signals on a device for a single visit. It keeps all session data directly on the device and severs connection with any tracking system but maintains an effective, relevant experience. CX Vault comprehends behavioral context and allows brands to use the contained data to make adjustments within the Vault, offering relevant session-based experiences while adhering to compliance standards.

Live-time Data and Identity Stitching Amplifies Output



Implementing a CDP into an Existing MarTech Stack

When implementing data solutions, time-to-value varies based on the amount and quality of data being captured, and the specific business goals and objectives. Most CDPs take 12-24 months just to implement – current campaigns will be over by then.

With traditional CDPs, implementing data solutions is painful and time consuming:

1. You need to gather requirements. That involves identifying the data sources, metrics, and KPIs that are relevant to the business and specific use cases.
2. Next, there's JavaScript tagging and data layer development, a time-consuming and painstaking process of going through every single web page and tagging every single item you'd like to collect information on. And when something on the webpage needs to be changed? The tag is broken and must be corrected.
3. Then, the data must be cleansed to ensure it's accurate, consistent, and without errors or duplicates. Some programs have automatic systems that can do this, and some must be done manually. Are you seeing the time pattern?
4. Finally, you're able to collect the data – as long as nothing has changed on the digital channel, in which case you may have to start all over again.

After all that work to get the data, it better be great data, right? Well, did you tag for it? If not, you won't have the right data. And without good data, marketers can't make informed decisions on how to engage with consumers.

Why Decisioning Platform Implementations Take so Long

Too many decisioning platform implementations end up delayed due to data complexity, incomplete data mapping, and new, unreliable data feeds being created. Often, they time out and databases aren't populated. Site mapping subprojects are a common culprit for time delays, where the team responsible for data tagging on the site requires an entire project to determine which parts of each page need to be tagged. This spirals into a dysfunctional and impossible undertaking where the marketers must define (sometimes with wireframes) which elements of each page are important for future marketing campaigns. But the reality is, marketers are a creative bunch, and their ideas are constantly evolving. This can cause the project team to be caught in an endless loop of tagging, or prompt the tag management team to place limits on data collection, rendering data points static or unusable.

Successful, dynamic marketing demands a data capture solution that can be implemented quickly and captures all the data to minimize disruptions and maximize time-to-value, without relying on inefficient tagging. This is where Celebrus shines for marketers and data teams - a single line of code captures ALL data in live time and pulls it into easily actionable signals. These signals are used to inform and plan strategies to feed the adaptive models within decisioning platforms.

What Success Looks Like

Successful decisioning platforms have at least two key elements in common: good first-party data and a robust offer set. These elements enable personalization, customized offers, and contextual understanding of what's relevant and important to an individual consumer in-the-moment. To do all this they need rich data - the more data brands capture across more interactions, the better decisioning platforms can predict recommended outcomes.

To truly make the most of a decisioning platform and create outstanding customer experiences while boosting business performance, it's crucial to rely on contextualized first-party, live-time data. Using data that's days old just won't do, especially when consumers can give us a wealth of fresh insights in just a few interactions. It wouldn't be wise to build a decisioning platform on outdated information, especially when Celebrus can provide a wealth of usable data in true live time.

For decisioning platforms to work well, they need high quality, up-to-date data. This allows them to make better recommendations based on what's happening in live time, not through pre-baked journeys. In addition to top notch data, Celebrus delivers impressive results, like achieving ROI in just six months – no one else can do that.

Celebrus delivers live-time data that can be instantly utilized within any decisioning platform. This enables marketers to launch 1:1 customer engagement, rather than getting stuck reconfiguring data flows that don't deliver ROI right away. Celebrus is deployed and connected quickly, giving busy teams the chance to get ahead with a solid data strategy. Brands can easily surpass the efforts of larger organizations by layering in a decisioning platform, like Pega CDH, for real-time decisions and recommended next-best-actions.

What Celebrus and decisioning platforms are capable of:

- Fewer emails with better personalization and higher conversion
- Identity resolution
- Reduced number of calls to call center
- Optimized call routing to increase customer satisfaction

The Solution

To have the best data available with the best decisioning solution quickly, you need three things: A systems integrator, a live-time data platform, and a decisioning solution like Pega or Teradata. The combination of these three solutions provides the best of the best in their specialty:

Systems Integrator



CXForward is a top systems integrator and trainer for 1:1 customer engagement platforms. Combining decades of sales, operational, and technical expertise, they provide exceptional MarTech guidance for hundreds of Pega implementations. CXForward is one of Pega's most trusted engagement partners with the most experienced decisioning specialists in North America, helping companies get the most out of their 1:1 customer engagement investments.

Live-time data



Celebrus is the disruptive data technology platform focused on improving the relationships between brands and consumers via better data. Celebrus redefines what digital identity verification means to power both next-level marketing and fraud prevention use cases. Deployed across 30+ countries throughout the financial services, healthcare, retail, travel, and telecommunications sectors, Celebrus automatically captures, contextualizes, and activates consumer behavioral data in live-time across all digital channels.

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