



Turning customer interactions into WOW moments



Creating **WOW** moments for customers requires leveraging data to anticipate, predict, and respond to consumer behavior in real-time.

Key takeaways

- The right technology is critical to creating an exceptional customer experience
- Enterprises who invest in cross-channel personalization and customer experience earn higher conversion and retention rates
- The right data builds the framework for customer experience transformation
- Identifying and responding to customer intent signals in real-time is the key differentiator for leading organizations

Every brand has the potential to create wow moments.

Digital transformation is a hot topic, and for good reason. Enterprise organizations looking to create high-impact, individual-level customer experiences at scale need detailed, accurate, and actionable digital data. Unfortunately, customer experience professionals continue to struggle with capturing, connecting, and analyzing data to inform the next-level decisioning technologies that create customer wow moments.

When they do, however, it's a game-changer. A Forrester Opportunity Report, [Invest in Customer Insights to Drive Business Growth](#), reveals that 76% of decision-makers who invested in cross-channel

personalization and customer experience in 2021 saw increased conversion rates, and 67% reported improved customer retention. More than one third considered it a “transformational benefit”. And they’re right – being able to collect comprehensive data, with context, and immediately turn it into one-to-one messaging will transform your organization.

As with any transformation, comes challenges – in this case many, but that's something marketers are used to. Marketing and customer experience is a fast-paced environment with constantly changing customer needs and market dynamics. Maintaining consistent personalization across channels and experiences, while also dynamically adapting to changing needs, not to mention meeting customer expectations (and regulations) for privacy and trust is a lot to juggle.

The biggest challenge is finding the right technology to enable these exceptional experiences. The rise in digital channel use, privacy and security compliance, and data silos are critical issues for organizations to overcome. This eBook explores the keys to success in executing a digital transformation that enables stand out customer experiences that drive retention and revenue.

The key processes and tools involved in delivering a personalized customer experience

Your digital customers expect one-to-one interactions with the companies they interact with. They want authenticity, personalization, and consistency across

channels. This means communications that are informed and based on up-to-date information that reflects all previous transaction history and behaviors. To deliver the best customer experience, and inspire acquisition, conversion, and loyalty, it's important to provide the right message, support, offer, or incentive to the right people at the exact moment that matters. This requires leveraging data to anticipate, predict, and respond to consumer behavior as well as to personalize individual experiences in real-time.

Capture the right data across channels

Behavior and interaction data about every customer should be captured once and used many times both in real-time (milliseconds) and as part of wider analysis. To deliver a sophisticated customer experience, highly granular behavior and experience data is required. This is often the biggest challenge organizations face – your CX activation is only as good as the data that feeds it. Choose a data capture solution capable of capturing your customers' mobile interactions i.e., gestures, device orientation and chatbot text. Not all do. It's also important to ensure your solution can capture from Accelerated Mobile Pages (AMP) and browsers with tracking prevention technologies like Apple's ITP. Make sure your data capture is compliant with GDPR and other privacy laws. Customers must provide consent and automated systems must manage cross-channel consent and prevent the capture of opted-out customer data.

Contextualize everything

Enrich customer behavioral data to add valuable context to customer profiles and enhance interactions and engagement. Leading enterprises are increasingly turning to advances in technology such as machine learning, to enable timely contextualization of all customer data and predict their likely next actions. It can also support you in providing advanced recommendations and help customers make decisions faster - which in turn boosts revenue. Natural Language Processing updates customer profiles with sentiment scores, visitor intent, and preferences in-

the-moment and across brands and channels. Data mapping further links intel with precise situations and individual requirements, providing a foundation for personalization and next-best-actions based on real life interactions.

Personalize, trigger, and deliver content

Modern customer data solutions automate the delivery of real-time, personalized content, based on pre-configured behavioral signals, by linking Automated Marketing Signals (AMS) to enterprise decisioning systems. The ability to respond as soon as a customer shows intent [dramatically boosts conversion rates](#) and customer satisfaction with minimal effort. Connecting smart data to your decisioning applications in real-time (i.e. milliseconds) enables you to share highly personalized content at an individual level, providing the best response for their situation in-the-moment.

Optimize engagement and minimize issues

The perfect content is worthless if no one sees it. Most organizations don't have clear insight into whether their content was delivered or if it was ever seen, and there's no real reporting on visibility. To make intelligent decisions you need to ensure your content is being seen, and that your analytics are providing accurate engagement results based on real views rather than assumptions based on what was supposed to happen. [Automated visibility detection](#), performance timing, and anomaly detection are key components in your hyper-personalization strategy and should be part of any modern customer data solution. Tracking when and what content was displayed, where it was displayed, and for how long can provide deep insights to boost marketing ROI by maximizing content, offer, and ad 'viewing time'. With an advanced data solution, you can also detect and resolve problems with inefficiencies in sales or customer-service related channels and identify unusual customer behavior and channel performance issues to facilitate rapid diagnostics and response.

Plan for evolution

As with any growth and improvement initiative, you must consider progressive evolution to accommodate future learning and growth. Customer expectations are always increasing, as is the technology to identify, understand, and respond to those needs with hyper-personalized, moments-based experiences. The enterprises prepared to adapt and act on these opportunities the fastest, and the most intelligently, will quickly rise to the top.

Getting started on your customer experience transformation

Knowing how to start your journey to providing a superior customer experience (CX) can be difficult. While it would be nice to have unlimited resources, most organizations don't, so you need to understand where to focus resources to achieve the most return. Here are five key steps that our enterprise clients typically follow when making real-time personalization part of their customer engagement strategy.

1. Define Your CX Objectives

Think about what your customers actually want and need, otherwise decisions become too internally driven or limited by infrastructure. Always consider the experience from the customer's perspective and determine what you're trying to achieve. Are you looking for a cohesive experience that works across all channels and platforms? Do you want to provide a personalized brand experience at the individual level? Or are you aiming for the ultimate goal - leveraging all available data to customize every touchpoint in-the-moment and ensure you deliver the best interaction, perfectly timed, every time?

2. Understand Your Data Requirements

Legacy data systems often rely on batch data to identify patterns and predict future behavior trends. Being able to interact at the right moment of engagement, in a way that's non-intrusive and delivers

value, requires [real-time data feeds](#) and low-latency connectivity (i.e. "in the blink of an eye") with your decisioning and analytics systems. This will then enable you to deliver the best offers to your customers in-the-moment and across any digital touch point.

3. Document Technical Systems

Data capture is only one aspect of building the CX. It's important to fully understand the legacy systems in play as well as the decisioning and marketing technology (MarTech) systems that will be responsible for the execution of targeted efforts. Most enterprises have a myriad of solutions, products, and vendors. What they lack is a single view of what they're using, on which digital assets, and why. When mapping out technology and MarTech stacks, don't just focus on the specifications - include what's being enabled (how data is collected, shared, used, and stored between systems and platforms), and what value these systems add. This step removes potential duplication, irons out inefficiencies, and flags any data, process, and organizational gaps.

4. Define And Address Gaps

Once a clearly defined CX framework is in place, you can begin architecting and developing solutions to capture the required data. At this stage, you also need to look at your technical systems (outlined in point 3) to make sure you're filling the data gaps. Access to detailed digital data is normally the missing ingredient. While it may exist, it's often siloed, fragmented, and hard to integrate. It may be poor quality, 'dirty', or prone to anomalies which make personalized experiences ineffective. Close gaps with a CX data solution that includes built-in tools to help unify, clean, and optimize your data. In addition, not all the information you need will exist within your business. With connected platforms and APIs, third-party data can also be used to build market, trend-led, and behavioral context. The better the data, the better the experience.

5. Outline a Transformation Plan

Having defined the art of the possible and what's required to get there, create a roadmap that assembles the missing pieces of the puzzle along with detailed timelines. Include all the resources you need to succeed – including people, data, and technology. Be sure to factor in progressive evolution and service development to accommodate future growth and market changes. Where possible, look to simplify the integration path, shrink timeframes, and go to market faster with solutions that don't require tons of manual configuration, coding, or setup to launch. This will

Put yourself in your customer's shoes

A real-life example of delivering exceptional customer experiences in the insurance industry

Leading organizations are working to provide more relevant customer experiences through personalizing content and promotions. To achieve true one-to-one personalized marketing, you have to move beyond aggregated segmentation which requires highly accurate and detailed customer data.

Enterprise decisioning systems can drive targeted, relevant content personalization, but the effectiveness of next-best actions is highly reliant on the timeliness and quality of the data feeding it. To excel at personalization and customer experience, organizations must invest in customer data platform (CDP) technology to improve data quality and reduce latency.

Here's an example of how an innovative insurance group used Celebrus CDP to inform their decisioning systems and provide exceptional one-to-one experiences.

Penny, a homebuyer, visits the insurer's website looking for home insurance. She inputs the details needed to get a quote but doesn't purchase the policy.

From the moment she visits the website, all of Penny's online behavior is being captured in real-time and joined together in a single comprehensive record.

When Penny uses her mobile to return to the site the next day, the homepage is personalized in real-time for Penny, prompting her to resume her application, which she does.

A week after Penny purchases her home insurance policy, the insurer runs a highly targeted Facebook campaign promoting contents insurance to customers who only have building insurance. Penny's information has already been captured and connected across channels, identifying her as both the building policy holder and active Facebook user, so she's selected to receive the ad.

When she clicks the ad, she goes to a personalized landing page on the insurer's website. She fills out the form, making sure "pet- related damage" is covered. There are a few questions she's not sure of, so she hesitates for a while. Granular behavioral data and signal detection capabilities enable the insurer's data platform to recognize customers who are struggling to buy, and react immediately. After 90 seconds Penny sees a pop-up banner offering help via webchat. The online agent helps her resolve her questions and complete her purchase. The CDP captures additional data from Penny's application, creating more opportunities to sell her relevant products in future.

Connecting the CDP with the insurer's marketing cloud enables them to send Penny targeted messages across a range of digital and offline channels. Penny is identified as a pet owner, so when the insurer runs a pet insurance campaign the next month, she's targeted directly.

This is a great example how leading insurers leverage innovative CDP solutions to capture, create, connect, and control their customer data. Insurance companies benefit from increased conversion rates and enhanced effectiveness of their marketing efforts, while optimizing the experience for customers like Penny.

Leading organizations achieve impressive results with hyper-personalization

Healthcare



- **350+ data sources captured and connected** including patient satisfaction, physician group, call centers, pharmacies, digital, web, and mobile
- **Single record of truth** created for patients with enriched data that drives deeper insights to improve patient experience and health outcomes
- **Care journeys tailored to patients'** individual needs and behaviors by identifying individuals, tailoring messages, and improving level of care
- **2.6 benefit to cost ratio** using follow-up emails and web personalization to patients who abandon online physician search
- **4.7 benefit to cost ratio** for presenting a targeted assessment offer to clients who exit and return to particular health pages

Retail



- **6% increase in CTR and 8x increase in sales per email** send from personalizing emails with relevant, targeted content instead of broadcast and segmented emails
- **13% increase in sales per email** by analyzing data to understand and dynamically populate messaging aligned with browsing behavior
- **14.5x increase in sales per email** using granular, real-time data to enable targeted recommendations based on abandoned product
- **30% reduction in PPC spend** with no loss of sales by analyzing the customer journey to understand all entire path to purchase, rather than last-click methodology

Retail banking



- **\$12M revenue in the first year** retargeting web visitors who used financial calculators, abandoned an application, or browsed products
- **\$7.5M profit** using digital data in predictive modelling for cash loans
- **80% increase in customer experience** using digital analytics to improve the online service registration process
- **\$50M in the first year** by enabling real-time decisioning to drive improved customer engagement with a 50-70x increase in CTR
- **15x higher email open rates** by upgrading email retargeting to real-time

Insurance



- **Increased sales conversion from 10% to over 30%** by calling the customer within 15 minutes of them abandoning a quote
- 750% ROI in the first year by calling customers who abandoned a quote in real-time, generating 30 to 60% sales conversion
- **15% increase in conversion rate** for insurance site visitors by using AIDA (Attention, Interest, Desire, Action) methodology to target content
- **10% reduction in media spend** with no loss of sales using granular interaction data to accurately attribute conversions

Supercharge your CX with Celebrus

Many enterprise organizations around the world use Celebrus from D4t4 Solutions as an integral part of their data driven CX infrastructure because of how easy the solution is to deploy – a single line of code to be exact. Celebrus is 100% laser-focused on data capture and is constantly innovating and staying ahead of the curve. Data captured by Celebrus satisfies privacy regulations including GDPR, CCPA, and more, providing peace of mind across global businesses. Client revenues often run into the hundreds of millions of dollars as a result of delivering highly personalized customer experiences at scale.

Celebrus was the first data capture solution to combine advanced machine learning (ML) with natural language processing (NLP) and real-time data capture. These technologies enable enterprise clients to have total visibility of customer behavior, arming them with powerful insight into customer intent. These pioneering institutions deliver genuine, individual level personalization, in-the-moment. With out-of-the-box machine learning features, Celebrus removes the configuration headaches and costs typically associated with capturing behavioral signals. Offering unique capabilities, Celebrus delivers outstanding benefits for leading organizations that are serious about providing world-class customer experiences by shifting marketing activities from reactive to ‘in-the-moment’.

Learn how Celebrus can help you listen to your customers in every channel, leverage all interaction data, and start WOWing your customers in-the-moment.

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