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Customer Experience Management

The New “New” of Digital Marketing and the Role of Web Content Management

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One would be hard-pressed to find a digital marketer today who is not all too familiar with the concept of web engagement. It was not so long ago the term was coined, but the evangelization of the idea has already reached a point of maturity in its hype cycle. As consumers themselves, marketers understand that their target audiences are naturally more responsive when messages are tailored, and they appreciate that relevance is the key to audience attention. Whether in B2B, B2C, non-profit, or government, the folks on the receiving end of these messages are people with individual interests, experiences, desires and needs. More and more, they expect these to be factored into their digital experiences.

Customer experience is another notion hardly lost on the marketing profession, or even the general public for that matter. As a term, it has been around much longer than web engagement, but its meaning has evolved over time and varies from one circumstance to the next. Of late, customer experience and customer experience management (CEM or CXM) have become the new “new” of digital marketing parlance, or, more specifically, of the technology vendors who want to help achieve that noble goal. According to the latest product releases by a number of web content management vendors, web engagement management (WEM) seems to be yesterday’s terminology while CEM is the flavor of the day.

It is the case, however, that CEM is far more than a positioning statement. CEM is emerging as a distinct digital marketing practice. Simply put, interacting with customers is fundamentally different than interacting with prospects. The difference is data. Organizations are sitting on a treasure trove of information about customers. Savvy marketing executives and managers are realizing that they can tap into that data and connect it with content management systems to drive sales, improve targeting and conversion rates, and take engagement to the next level.

Although WEM has always been far more about strategy and process than a particular technology, both WEM and CEM rely heavily on the capabilities of numerous technologies. This paper defines CEM and breaks it down into relevant sub-parts. We focus on the functional characteristics of the phenomenon and argue that the whole is far greater than the sum of the parts, many of which are already present in most organizations today. We also emphasize the central role web content management plays in binding the digital aspects of CEM together.

Customer Experience Management: The New “New”

Two forces have shaped contemporary engagement opportunities for digital marketers and customer experience professionals:

1. Technology can now provide organizations with insight into more and more relevant information about their audiences. Powerful data about consumers—stated and implied preferences, shopping habits, social graphs, buying patterns, geographic and contextual information, support history—can be aggregated and considered in concert.



2. Channels for reaching customers have expanded beyond the traditional web to include hundreds of channels and devices. Organizations now have a richness of opportunity to gather data about customers as well as deliver targeted content in context.

Taken together, these forces allow marketers and customer experience professionals to create a true 360-degree view of the customer, where one did not exist before.

Enter customer experience. We define customer experience as a customer's holistic perception of a company and its offerings based on all of the customer's interactions with the company, from branding, marketing and pre-sales through to fulfillment, services delivery and support. The full breadth of customer experience includes both digital and interpersonal interactions as well as physical ambiance. Anyone who has shopped in an Apple store has an intuitive appreciation of what it feels like to patronize a store with a keen awareness of the interpersonal and ambient aspects of customer experience. From the clean, inviting aesthetics that encourage playing with the devices to the helpful staff and no-line check-out process that gets consumers on their way quickly with a cool bag in-hand and satisfied grins on their faces, Apple's in-store experience sets a high standard for interpersonal customer experience. Our focus here is on delivering a digital experience which parallels this type of interpersonal one: discovering a product or service via the Web, receiving follow-up information via email, conducting research through various digital channels, soliciting feedback from other customers, purchasing the product online (as appropriate), requesting support, searching for additional documentation, recommending the product / service to others or providing a negative critique of the ownership experience, etc. All of these consumer actions provide opportunities for the company to gain insight into the wants and needs of its consumer base and to create positive experiences for prospects and customers alike. Naturally, customer experience extends beyond our commerce example to other forms of businesses such as non-profits, government bodies, educational institutions, etc., but we reference the commerce scenario throughout this paper for illustration purposes.

Attempts to orchestrate the digital customer experience are not new, and analysts have been studying the niche for about a decade. What *is* new is that web content management vendors are now coming into the fold, appropriately realizing that their products can serve as hubs of all the information, data and processes involved in presenting and managing a true 360-degree view of the customer. These vendors understand that the principles of WEM they have espoused in recent years are central to CEM: customer centricity and relevance, personalization, contextual- and channelization, interaction consistency, ease of use, and the ability to manage and act on customer intelligence, just to name a few.

Similar to our concept of the engagement hub, first defined in the Outsell Gilbane paper entitled *Content, Context and Conversation: The Three Kings of Consumer Engagement*, web content management platforms are just as capable of serving as an organization's *digital customer experience hub*. The premise is the same:

“[It] is a framework, or conceptual tier, that houses [relevant] technologies and marries content and customer intelligence to deliver relevant and consistent messaging to consumers across multiple channels, web and social destinations. It can be a single product with numerous functions, or an integration of multiple products. It is a combination of web analytics, campaign management, email, marketing automation, a relevance engine, and a dynamic web content management system representing an integrated, multi-channel fulfillment center.”



What distinguishes CEM from WEM, however, is the focus on the *customer*, as opposed to the *prospect*. Marketers tend primarily to focus on an audience of prospects, even if that audience has already transacted with the organization in the past. Thus, WEM has historically emphasized only half of the so-called 360-degree view of the customer. It is not as though the WEM approach intentionally excludes customers as opposed to prospects, but since marketers have been the primary practitioners of WEM, this has become the pragmatic reality. So while WEM has been ambiguous in its audience focus, CEM intentionally includes the literal definition of “customer” as a pillar of its strategy.

Customer experience professionals deal with the transaction and post-transaction experiences, both of which exclude the prospects in the audience by definition. Thus, there are a number of additional post-transaction processes and lifecycles for CEM to grapple with that marketers have not tended to consider in the past. These include ordering, fulfillment, delivery, billing, support, etc. Therefore, the requirement of a content management system to serve as the digital customer experience hub among the many back- and front-office functions is critical to support the CEM strategy of satisfying the needs of individual customers and leading them to loyal brand advocacy.

The Whole Is Greater Than the Sum of the Parts

Much like web engagement management, CEM is a strategic approach supported by an ecosystem of functional capabilities and data. The components of this ecosystem are powerful individually, but when they work in concert, the afforded opportunities are endless. In the paragraphs that follow, we briefly discuss some of the enabling components of a digital customer experience strategy, many of which are already present in organizations today, regardless of whether or not the organizations have defined CEM strategies in place. These capabilities work together to provide the right information to the right audience at the right time.

Targeting and Personalization

Personalization and targeting engines are the frameworks from which the practice of delivering tailored, digital interactions is made possible. And, as we have said before, personalization is the first principle of relevance and a key underpinning of a sound CEM (or WEM) strategy. Contemporary strategies assume the ability to customize the experiences of individual customers based on both their expressed and/or anticipated interests. We should note that personalizing content for existing customers as a part of a CEM strategy requires less guesswork than in marketing to prospects, given access to the existing history and data; however, the expectations of an actual customer are even higher, and there are far more data sources to integrate. In either case, the belief on the part of the customer that the brand “knows me” is the critical initial step of engagement.

Web Analytics

Web analytics is a critical component of any engagement or experience management strategy and a necessary complement to web content management. In order to provide compelling, relevant content, the digital channel must first be able to perceive the visitors’ interests. Analytics enables brands to ascertain which content is being consumed by the general audience, valuable knowledge in its own right, but its most



important role in CEM is to lend insight into the habits, interests and needs of each individual customer based on browsing history. From a marketing perspective, a visitor's history of content consumption provides hints into related products and services he or she may find compelling. From a customer experience perspective, such information may indicate a person's role in a client organization, a critical clue into the data and supporting post-sale processes with which they are involved.

Email and Campaign Management

Campaign management capabilities have become critical to well-rounded WEM and CEM strategies. Contemporary competencies have helped brands transform their marketing philosophies away from the old adage of "target, interrupt and stimulate" and toward one that includes perceiving the audience's interests and responding with targeted content. Since customers and prospects alike are interacting with companies across numerous digital channels, the ability to manage campaigns in a manner that ensures their consistency for each individual across these channels is a core component of a CEM strategy. In addition to assisting with the operationalization of campaigns by automating workflows, managing leads, and segmenting the audience, present-day capabilities now incorporate analytics and content management systems to provide contextual marketing, predictive analytics and real-time offer management across all digital channels.

Search

Because search is so ingrained in our daily lives, its evolution has gone relatively unnoticed and has been under-appreciated by many. However, search has become one of the most critical underpinnings of customer experience success. Since its native inclusion in browsers, phones, and even television DVRs, search has become the de facto standard for the way visitors arrive at a website, as well as the way they navigate the web property itself. A search box today is the digital equivalent of a store greeter asking, "How may I help you?" The answer can unlock the interests of the visitor and holds the key to providing him or her with relevant, compelling, valuable content in return. The company's ability to listen to these interests and respond appropriately is a critical business asset, but even more important is its ability to learn from numerous such interactions. *What are customers looking for? Did it seem hard for them to find? What can we learn about our audience and their related interests based on their combined search and browsing patterns? What did our customers say they were looking for when they arrived at our digital doorstep, and what did they ultimately buy, download, read?* Search lends insight into all of these questions and more. When well-attended, a honed search engine will not only provide satisfying experiences for users by helping them find what they are looking for, but also serve as a critical source of customer interests and desires, an essential requirement for optimizing future customer interactions.

Translation and Localization Services

By definition, a well-tuned digital customer experience is mindful of the audience and its needs, and can interact accordingly. Naturally, there is no interaction—no exchange of information for value—if the participants cannot understand each other. Communicating with an individual in his or her own language is fundamental to a successful experience. Localization, then, is essential to relevance, a key requirement for a successful customer experience. Services and technologies are available to assist with managing the



localization process, and they are most effective in supporting CEM when they work in concert with formal content management practices and technologies.

Preparing content for consumption by regional audiences is a process that takes both language and cultural factors into account. Translation is often the most recognized element of localization, but communicating within the proper cultural context is often even more important than simply getting the words right in the local language. Customers and prospects tend to take well-localized interactions for granted. However, they certainly notice when localization is poorly done, or, worse, not done at all. Failure to connect with local sensitivity can alter opinions or even eliminate the ability for customers to take part in what could have otherwise been positive experiences.

Customer Relationship Management (CRM)

CRM, which is a business practice as well as a technology category, focuses on managing the information that stems from numerous interactions between a company and its customers in an attempt to manage the relationship in an orderly fashion. The processes surrounding these interactions include customer support, sales and account management, and customer service to name a few. The ultimate goal of CRM is to improve customer satisfaction and maximize profits by consolidating information about each customer, and by advising and streamlining many of the internal processes with the appropriate customer information. CRM clearly is a critical element of a customer experience strategy since much of the data about the customer resides in the CRM system itself. Thus, CRM holds one of the critical keys that unlock the differences between true CEM and web engagement: insight into the post-transactional interactions with the customer. This information about the *other 180*-degrees of the consumer has amazing potential for the customer experience when coupled with information available within the digital marketers' toolkit and managed through a central content management system.

Social

Social is the interactive dimension of the digital customer experience. Social networking channels, à la Twitter and Facebook, serve as additional mediums through which both customers and prospects alike can communicate with and about the company, and the company can listen and respond in return. Likewise, social networks enable companies to communicate proactively with an audience who has expressed an interest and volunteered their attention by following, liking, friending, etc. Additionally, the enablement of user-generated content and sharing functionality within the context of a company's digital property has taken the notion of engagement to a whole new level. Figurative "conversations" have become literal ones, and both marketers and customer experience managers alike are able to get real feedback in ways they never could before.

The establishment of social media has also given rise to social monitoring platforms. Beyond the obvious marketing benefits, customer experience managers can now discover customer influencers as well as the perceived relationships between their content, services and products. This information offers significant value to the company, allowing it to hone its positioning in ways that facilitate a common understanding with prospects and customers alike. Additionally, companies are able to be nearly ever-present to provide support in case of a perceived *#fail*, and can likewise harvest critical information for product improvement directly from customers willing to share their product experiences.



Web Content Management (WCM)

As we have written in the past, a WCM system is the technological linchpin of the digital marketer's workbench. Further, with regards to a company's CEM strategy, the WCM system is a primary component of the digital customer experience hub (illustrated below), marrying content and customer intelligence from the technologies and capabilities described above to deliver relevant, consistent messaging to customers across multiple digital channels and destinations. In some cases, the components of the hub present as distinct products integrated together as part of a best-of-breed solution with WCM at the core, while in others the solution presents in the form of a single, contemporary WCM product with extended functionality. There are a number of other technologies that could factor in as well, from eCommerce to the Enterprise Resource Planning (ERP) system to the Help Desk Support System, but the commonality among all of them is *content*, and the need to deliver it at the right time, in the right context, to the right customer. Content is central to all phases of the customer experience lifecycle, making WCM systems the cornerstone.



Digital Customer Experience Hub. This illustration represents the role WCM plays in managing the inbound and outbound information, content and data related to the external channels (at the top of the illustration) and the internal systems and capabilities used to house and gather customer intelligence.

Conclusion

The advent of the practice of web engagement management was the dawn of a new era in which organizations began formalizing their approaches to relating to their audiences through the Web. As we noted in 2008 in a paper entitled *Engage Me!*, WEM was built on the premise that engagement “that delivers high value to all participants does not happen by accident, but rather, by design”, and “only when



the audience's experience is deliberately managed does it become repeatable, predictable, measurable, and capable of being improved and optimized."

While this remains true today, the contemporary landscape is populated with more devices and channels, making the term web engagement no longer sufficiently comprehensive. In actuality, "Digital engagement" is perhaps more appropriate. But rather than muddying the acronym waters further by suggesting that "DEM" replace WEM, we acknowledge the limitations of the WEM terminology and focus instead on its strategic approach. Others, however, have used the opportunity to promote the use of the "customer experience management" term to avoid the restriction. This, in our opinion, is inappropriate given our considered distinction between customers and prospects, as well as both the data and processes associated with each.

As we have explained, CEM intentionally focuses on customers, and thus draws on data and considers processes that are not always in the purview of the digital marketer. Given this distinction, organizations need strategies that are unique to the different contexts for engaging with customers as opposed to prospects. The implications of thinking strategically about CEM are not trivial. Although outside the scope of this paper, we would be remiss if we did not raise them. The advance of CEM into the strategic limelight calls into question the ownership of an organization's digital channels, web and otherwise. Given the shift in focus, should marketers continue to be at the tip of the digital spear? Should customer experience and customer service professionals share this responsibility with marketers? Will the CMO's organization become responsible for customer service? There are no right answers yet, but continued advances in content technologies together with the evolution of the "digital first" mentality of consumers are increasing the relevance of such questions in boardrooms around the world.

Organizations know so much more about customers. Many companies are only beginning to realize the tremendous value of integrating what they know about their customers with the content that will appeal to and engage them. This is the critical role played by the WCM system and its companions, and the reason why the whole of the digital customer experience hub is far greater than the sum of its parts.





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