



Integrated Customer-Centric Strategies

The Navigator

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Contextual Relevance: The right message, in the right place, at the right time

Everyone agrees that more relevant marketing generates better results. But what does “more relevant marketing” mean in practice? It means delivering the right content through the right channel at the right time - with appropriate messaging, customized for individual prospects and optimized for wherever they happen to be in their buying journey. This is much more easily said than done, but it has become table stakes in today’s omni-channel, digitally-connected marketing and selling environment. Context is the key to achieving this, hence the term “contextual relevance.”

Today, there are innumerable places where customers and prospects can engage with your brand: on your website or social media community, while searching on Google, when they talk with consultants or opinion leaders, through your contact center, during a visit to your store, or elsewhere as they research your products/services and those of your competition. Your challenge is to meet your customers/prospects where they are, with content that recognizes what channel they are in and where they are in the buying cycle. This is what is meant by context, and context is critical to relevance, in two ways:

- **Knowing the customer**

Context enables marketers to understand the customer and the journey better, and to understand how to interpret customer behavior. New personalization technology does a great job of interpreting data to drive more relevant content to customers. However, marketers still need to know what content to create to drive these relevant experiences.

- **Creating appropriate content**

Behavior models such as customer buying cycles help provide a framework to contextualize customer activities, so marketers can create better content for personalization engines to

deliver. For example, in a retail behavior model, there could be different types of customers (1st time buyers, repeat buyers, and loyal customers) who might exhibit similar behaviors (e.g., adding a product to a shopping cart). However, the kind of content you would share with a first-time customer is likely different than a repeat or loyal customer.

The buyer's journey is non-linear and can move back-and-forth from channel to channel as buyers assess their needs and explore their options. As buyers move through their journey, what is relevant to them changes. In fact, it changes at each step. It is also impacted by roles, relationships, time, location, knowledge, weather, business processes, sentiment, intent, digital acumen, and other factors. This is particularly challenging in our increasingly digital world, where a customer's attention span is minimal, and competition is but a click away. That said, it is essential to know your customers and the context(s) within which you engage with them so well that you are always there when they need you.

In our next few emails, we will expand further on the concept of contextual relevance and provide actionable guidance for achieving it. And save the date of Tuesday, April 24th for an insightful webinar on the topic, in collaboration with industry-leading partners (registration link below).

Best Regards,

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ISM has been creating and implementing customer-facing strategies to maximize customer engagement for world-class companies since 1985. Give us a call and let's discuss your organization's unique challenges and opportunities.

Contact Us

Join ISM and Barton Goldenberg for

CRM Evolution 2018 Conference and Exhibition
April 9-11, Washington DC

Don't miss Barton's popular two-part Executive Bootcamp: ***Engaged Customer Strategy – Your Roadmap to Success in 2030***, and ***The Central Role of CRM in an Engaged Customer Strategy*** on Monday, April 9th

Every company needs to gather, organize, analyze and exploit today's deluge of digital data. Learn how best-in-class organizations like ExxonMobil, Amazon, Marriott, Uber, Disney, and others take an integrated approach to customer engagement.

[Register by 3/16/18](#) using CODE BG18 and save \$300

Everyone agrees that more relevant marketing generates better results. This means delivering the right content through the right channel at the right time - wherever they happen to be in their buying journey. This is much more easily said than done.

Join Barton and Matt Tharp, Chief Evangelist for bpm'online, for an insightful webinar:

Contextual Relevance – the Right Message, through the Right Channel, at the Right Time

Tuesday, April 24th 2018
11:00AM PDT, 2:00 EDT

[Register](#)

Engaged Customer Strategy - Your Roadmap to 2030

Today, customers have almost limitless ways to engage brands, using all kinds of devices across hundreds of potential touch points. This is the new normal, and the amount and complexity of available digital information will increase exponentially into the future. At the same time, potentially-available data already exceeds the ability of most organizations to harvest and process it. Every firm has strengths in some areas, and gaps in others. The winners in the coming decades will be those that commit today to developing capabilities to exploit this deluge of data, and to delight their customers by engaging them in their preferred channel, with exactly the right offer, at exactly the right time.

Read this Executive Summary of ISM's signature concept - a comprehensive approach to gathering and analyzing online and off-line customer data, deriving actionable insights and deploying tools and techniques to increase customer acquisition, retention and growth.

[Complimentary Download](#)

ISM Engaged Customer Strategy
Your Roadmap to 2030

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The challenge for any organization is to decipher which digital activities impact their business, and then to gather, organize, analyze and exploit this information. The goal is to capture and retain customer and customer value through enhanced customer loyalty, satisfaction and advocacy.

To meet ISM's goal to introduce a comprehensive strategic framework to help any organization (B2B, B2C, or B2B2C) gather digital and non-digital information about its customers, analyze it, derive actionable insights from it, and deploy targeted digital tools to optimize each individual customer's experience. These are the key components.

The Holistic Customer Profile: The Foundation

The Holistic Customer Profile: At the center of every effective customer engagement strategy is the Holistic Customer Profile - also referred to as the Customer Master File. This, residing most often within a CRM system, is the foundation of every successful customer-centric initiative since it enables organizations to derive a comprehensive understanding of each of their customers.

Identify Resolution:

These different data sources feed into the Holistic Customer Profile:

1. Transactional Data - Purchases, transactions, returns, etc.
2. CRM Data - Sales lead/opportunity tracking, marketing campaigns, customer service calls, etc.
3. Third Party Data - Customer, demographic, lifestyle and industry specific data.

Activities like store visits, service calls, contact center interactions, etc. are non-digital and take place off-line. This data provides important insights and needs to be brought into the Holistic Customer Profile. Similarly, digital touch data like website visits, e-Commerce transactions and social media engagements also need to be captured, organized and stored. Most often, this data will be unstructured. New analytic resolution tools not only provide the ability to integrate off-line and on-line customer data, but also to search both unstructured and structured data and feed this into individual customer profiles.

Listening and Data Analytics:

With more data produced in the past 2 years than in all previous history, there is no shortage of analytic opportunities. Using listening and data analytics tools, companies can easily sort, cluster, segment and understand each customer or customer group. Customer data flows in both directions - to and from the Holistic Customer Profile - continuously creating a more complete picture of each customer's preferences and desires.

With these and other cutting new tools, companies can move on all inclusive understanding of every customer, enabling continued and optimal one-on-one customer engagement.

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