Viewpoint

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Free Your Data to Elevate Your Customer Experience

Data is immensely important to the modern practice of customer engagement. But data is more than just some stodgy technical resource. Data represents insight that people can use to make judgements and evaluate contexts. It enables experts to connect the dots and make customer experiences more fruitful. And data is an accessory to a collection of very human and complex processes. It must flow freely within organizations so that it can help people make sense of situations. Leaving data to pool in unattended silos is counter-productive, and such restriction can keep your most experienced and talented people in the dark. That's unfortunate whenever it occurs, but within the customer experience (CX), it has particularly widespread consequences.

The CX process is a sequence of events that reflects which team is responsible at each moment of the customer journey. Those teams may come from different parts of the organization (marketing departments and contact centers, to name just two), and might well have different key performance indicators and agendas—but they shouldn't operate in isolation. Without contextual awareness of what everyone else is doing and how the customer is reacting along the way, each team risks operating in a bubble, surrounded only by the kinds of data they are most comfortable using and unaware of important information that may be hiding in someone else's data.

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In a worst-case scenario, the only people with visibility into the entire journey are the customers themselves. And if their dealings with an organization are fragmented, broken up by interactions that require them to retell their stories again and again, that means the organization isn't in control of the process and can't deliver the best possible customer experiences.

To operate with greater intention, organizations should free their data, making it available among teams and across the customer lifecycle. That helps those teams working early in the process to have the metrics they need to understand customers' long-term value, propensity to buy, communications preferences and what piques their interest.

Breaking data silos encourages personalized customer encounters. The free movement of data also supports faster, more accurate self-service, and helps identify customer advocates and detractors. In

fact, the availability of clean, cross-departmental data can consistently elevate an organization's responses to customer expectations—no matter where you are in the customer lifecycle.

Ventana Research asserts that by 2022, eight in 10 organizations will recognize the negative impact that siloed customer data has on creating frictionless, unfragmented customer experiences. However, simply recognizing the problem does not mean that an organization understands the potential solution. This is one reason why, for the next few years, taking action to un-silo data will be a competitive differentiator. We also assert that by 2023, just one-half of organizations will have developed initiatives to map and manage customer journeys by integrating sales, service and marketing processes. Yet unifying the data across those departments and processes is the underlying element that organizations will need in order to knit together solid customer experiences.

Organizations that take a long view of the customer lifecycle will more readily recognize the benefits of un-siloing data. Having a data-centric view of the journey creates an awareness across teams, where all internal stakeholders have the information they need to make coordinated decisions about customer plans. This approach encourages organizations to find the CX points where they can best influence customer behavior.

Fortunately, modern CX technology provides solutions in the form of customer data platforms (CDPs). CDPs have become an important element in the effort to allow data to be dynamic rather than static. They consolidate and clean customer data, moving it out of the contact center, CRM, websites, point of sale systems or other apps where much of it originates and into marketing and lifecycle campaigns, where it can be analyzed and made actionable. An organization that is equipped with a CDP and a forward-thinking data strategy can more easily envision what customers intend to do, what they like and dislike, and how they perceive the brand.

All of this suggests that CX professionals need to take steps toward liberating their data to allow it to be more useful in more contexts. They should audit existing data infrastructures to understand where data is being collected and why it sometimes sits in silos. They should examine both the technology systems and the business processes that freeze things in place. Often, processes need only adjustment—or to be better data-informed—in order for them to be dramatically more effective at boosting customer satisfaction. But processes and data must cross departmental boundaries if an organization wants to be truly "customer-first."

Some may be tempted to fall back on their existing tech stack, especially their CRM tools, to handle the integration and de-siloing. But organizational thinking must shift toward greater internal collaboration and cooperation. CX professionals will be better off if they reexamine the fundamentals, take a wider view, consider the tools that are purpose-built to make data widely available—and put them to work.

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Keith Dawson is responsible for Customer Experience (CX) research, covering technology that facilitates engagement to optimize customer-facing processes. His focus areas include agent management, contact center and voice of the customer, along with technology in marketing, sales, field service and applications such as digital commerce and subscription management. Keith's specialization is in natural language speech tools and the wide array of customer analytics.