THE 5 UP-FRONT STEPS THAT ENABLE CROSS-CHANNEL INSIGHTS

An Ipsos Point of View
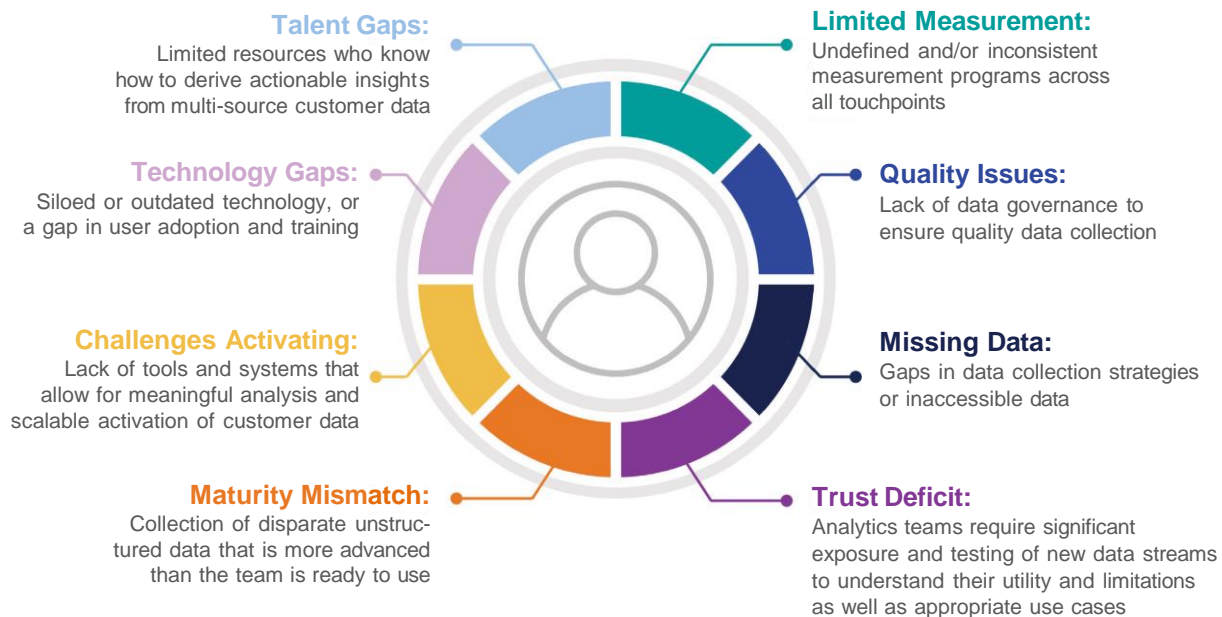
Ipsos

Challenges and Rewards of Building for Cross-Channel Insights

Most organizations have strong aspirations about using integrated, multi-source data for data-driven CX decision making. Improving their complete view of the customer across digital and physical channels is an increasing business priority requiring significant investment to connect data ecosystems. Having a complete view of the customer allows companies to employ effective direct marketing, personalize touchpoint, optimize the experiences that matter most to customers and prioritize investments that ultimately drive business outcomes.

However, getting a complete view of the customer is challenging for many reasons including:

Talent Gaps:
Limited resources who know how to derive actionable insights from multi-source customer data

Technology Gaps:
Siloed or outdated technology, or a gap in user adoption and training

Challenges Activating:
Lack of tools and systems that allow for meaningful analysis and scalable activation of customer data

Maturity Mismatch:
Collection of disparate unstructured data that is more advanced than the team is ready to use

Limited Measurement:
Undefined and/or inconsistent measurement programs across all touchpoints

Quality Issues:
Lack of data governance to ensure quality data collection

Missing Data:
Gaps in data collection strategies or inaccessible data

Trust Deficit:
Analytics teams require significant exposure and testing of new data streams to understand their utility and limitations as well as appropriate use cases

Achieving a well-orchestrated, connected and intuitive data pipeline and analytics ecosystem that empowers users across the organization to extract value from multi-touchpoint insights is as difficult as it sounds. That said, with proper diligence and a disciplined approach to data architecture and achieving outcomes, it can be done. Ipsos CX advises a user-driven approach for organizations embarking on this journey because the user's engagement and satisfaction is what will ensure actionable insights. Put simply, users are customers of the data, and the data needs to meet their needs!

Step 1: Define the Use Cases

An omni-channel data ecosystem that enables insights across multiple touchpoints will be coveted by a unique set of cross-functional stakeholders who take a holistic lens to the customer experience journey. And while specific channel or touchpoint/product owners may not have use for multi touchpoint insights today, if given the option to harness adjacent insights, they may surprise you with fresh ideas. Any organization embarking on a complete view of the customer should begin with understanding the wants and needs of users and enablers across the organization: those who analyze, those who action, and those who connect the ecosystem. The concept of User Stories from the Agile Methodology is a great way to document the needs across the business and identify commonalities.

This approach uncovers what questions stakeholders want to answer with data and what activations they wish to enable. Another key part of this exercise is to understand the KPIs each stakeholder is accountable for, as the future ecosystem must also enable KPI tracking and reporting.

Step 2: Map the Customer Journey

Many organizations have customer journey maps, but often they are outdated or only articulate the journey within a specific channel. When seeking to understand the customer 360, a comprehensive and evolving understanding of the journey across touchpoints is critical. A combination of quantitative and qualitative research is generally required to achieve this. In addition to mapping the journey, Ipsos embeds an understanding of the Forces of CX, which is our proprietary methodology for understanding how emotion plays a role in the customer experience. In order to drive meaningful outcomes, the Forces of CX must be understood and influenced, which means capturing data that reveals the forces at work.

Sample User Stories:

- As an analyst, I want to understand how customers who engage on the web differ from those who engage on mobile.

- As a CMI leader, I want to enhance the insights I provide to each business unit by highlighting common themes around BUs or products.

- As the Head of CX, I want to understand the incidence and impact of shortcomings in the experience so that I prioritize budget effectively

- As a marketer, I want to be able to segment my customers based on preferences so that I can customize messaging.

- As a product owner, I want to understand the profile of customers who most actively engage with my products.

- As a data engineer, I want the channel owners to follow a common taxonomy when they collect data.

Enjoyment
"They provide services that let me enjoy life more."

Status
"They make me feel valued."

Belonging
"I connect with the company's values."

Control
"I feel in control when I deal with them."

Forces of CX

Certainty
"It's clear what to expect when I deal with them."

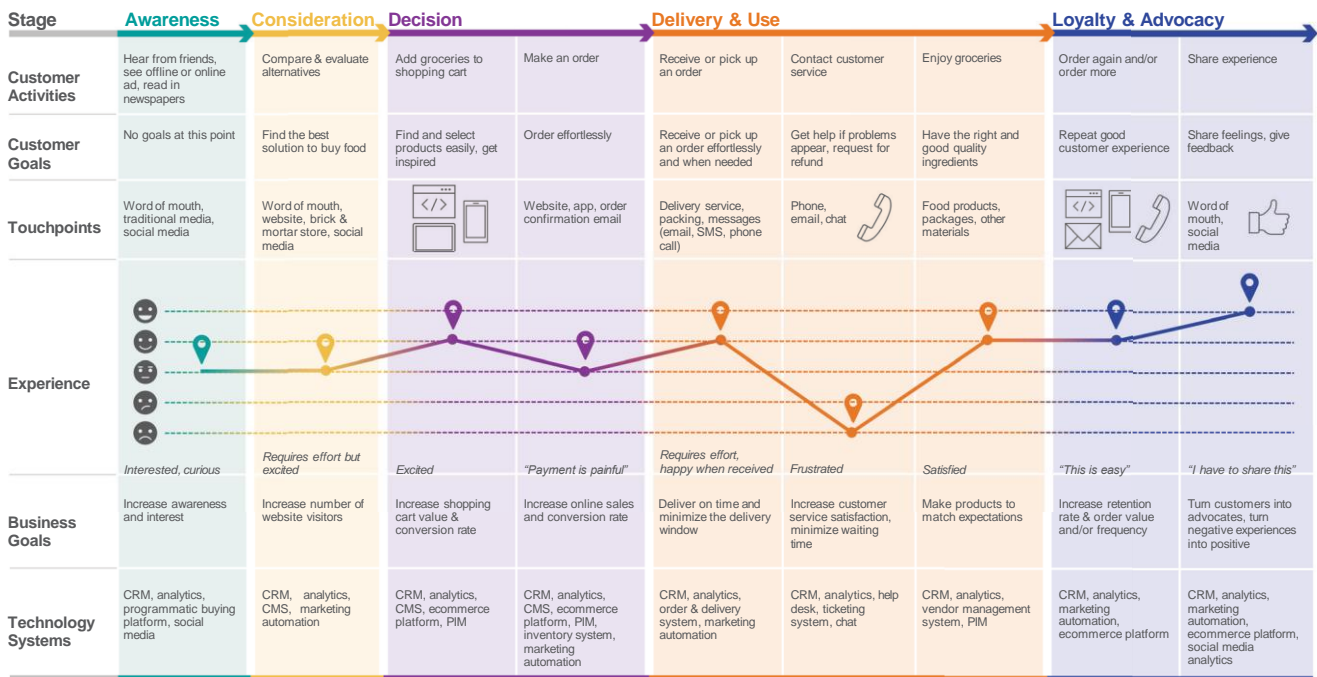**Fair Treatment**
"They treat me fairly."

Step 3: Conduct an Inventory

The next step is to inventory what data is collected today across the omnichannel journey documented in Step 2. By layering in the Use Cases from Step 1, you will be able to map the data across touchpoints to what business problems it will solve or objectives it will enable.

When documenting the inventory, detail is your friend. Include the data element name (e.g., gender), where the attribute is collected (website), how it is collected (sign-up form), what data items or variables are possible (male, female...), where it's stored at the source and/or downstream, and how it's accessed and used (by analysts, to power a personalization, engine…). This detailed exercise helps organizations uncover incorrect assumptions, such as learning that while something is collected in one place, it's not truly accessible where it needs to be. More often than not, organizations also realize that data they thought was being collected and stored is actually going nowhere.

Along with the inventory, it's important to establish a point of view on the quality and value of the data. Some high value data might have questionable quality due to inconsistencies in how it's collected, and some quality data may not serve any of the purposes identified in the use cases. This perspective should also be documented in the inventory.

Stage	Awareness	Consideration	Decision		Delivery & Use			Loyalty & Advocacy	
Customer Activities	Hear from friends, see offline or online ad, read in newspapers	Compare & evaluate alternatives	Add groceries to shopping cart	Make an order	Receive or pick up an order	Contact customer service	Enjoy groceries	Order again and/or order more	Share experience
Customer Goals	No goals at this point	Find the best solution to buy food	Find and select products easily, get inspired	Order effortlessly	Receive or pick up an order effortlessly and when needed	Get help if problems appear, request for refund	Have the right and good quality ingredients	Repeat good customer experience	Share feelings, give feedback
Touchpoints	Word of mouth, traditional media, social media	Word of mouth, website, brick & mortar store, social media		Website, app, order confirmation email	Delivery service, packing, messages (email, SMS, phone call)	Phone, email, chat	Food products, packages, other materials		Word of mouth, social media
Experience	*Interested, curious*	*Requires effort but excited*	*Excited*	*"Payment is painful"*	*Requires effort, happy when received*	*Frustrated*	*Satisfied*	*"This is easy"*	*"I have to share this"*
Business Goals	Increase awareness and interest	Increase number of website visitors	Increase shopping cart value & conversion rate	Increase online sales and conversion rate	Deliver on time and minimize the delivery window	Increase customer service satisfaction, minimize waiting time	Make products to match expectations	Increase retention rate & order value and/or frequency	Turn customers into advocates, turn negative experiences into positive
Technology Systems	CRM, analytics, programmatic buying platform, social media	CRM, analytics, CMS, marketing automation	CRM, analytics, CMS, ecommerce platform, PIM	CRM, analytics, CMS, ecommerce platform, PIM, inventory system, marketing automation	CRM, analytics, order & delivery system, marketing automation	CRM, analytics, help desk, ticketing system, chat	CRM, analytics, vendor management system, PIM	CRM, analytics, marketing automation, ecommerce platform	CRM, analytics, marketing automation, ecommerce platform, social media analytics

Once the inventory is complete, another pass should be taken to identify conflicting information. When the same attributes are collected across multiple channels but not managed centrally, information can be at odds. When building the data ecosystem, Master Data Management (MDM) tools provide solutions, but it's healthy to know where conflicts are likely to arise before starting the build.
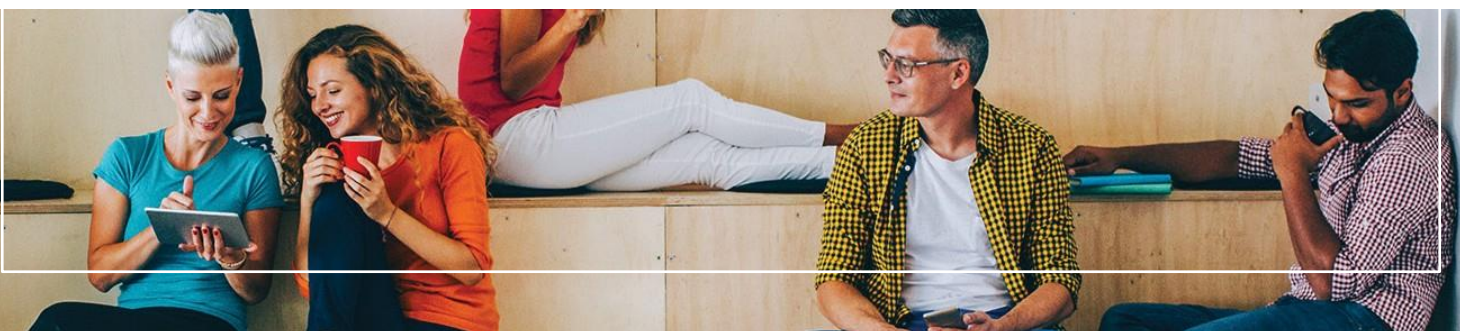
Step 4: Uncover the Gaps

Armed with detail on what data is collected and used across the journey, it's time to uncover the gaps. Without the use cases and user stories, this would be a daunting task! However, with the use cases in hand, this becomes a methodical exercise in exploring (1) what use cases aren't enabled by the data collected today and (2) identifying what data is needed across points in the journey to close those gaps. The outcome of this exercise is incremental and/or enhanced data collection requirements across touchpoints and channels.

At this stage, we also recommend evaluating and updating data governance standards to ensure relevancy and drive consistency. Data governance owners (sometimes referred to as Data Czars or Data Stewards) must articulate the Who, What, When, Where, and How about data collection and application. For example…

- **Who:** Who determines what data is collected, what vendors/suppliers of data are trusted to integrate with the ecosystem, and what sources of data are most reliable? Who are the users of data and what are their permissions?

- **What:** What attributes are collected, what is the standard format for data collection, and what is the protocol around integration?

- **When:** When is data collected (frequency) and when is it deemed viable vs. stale?

- **Where:** Where is data sourced from and where is it stored across source systems, central databases and/or within activation or BI systems and tools?

- **How:** How is the ecosystem managed, maintained and optimized? How are decisions made to ingest new sources, define the source of truth, and ensure end users can achieve their goals?
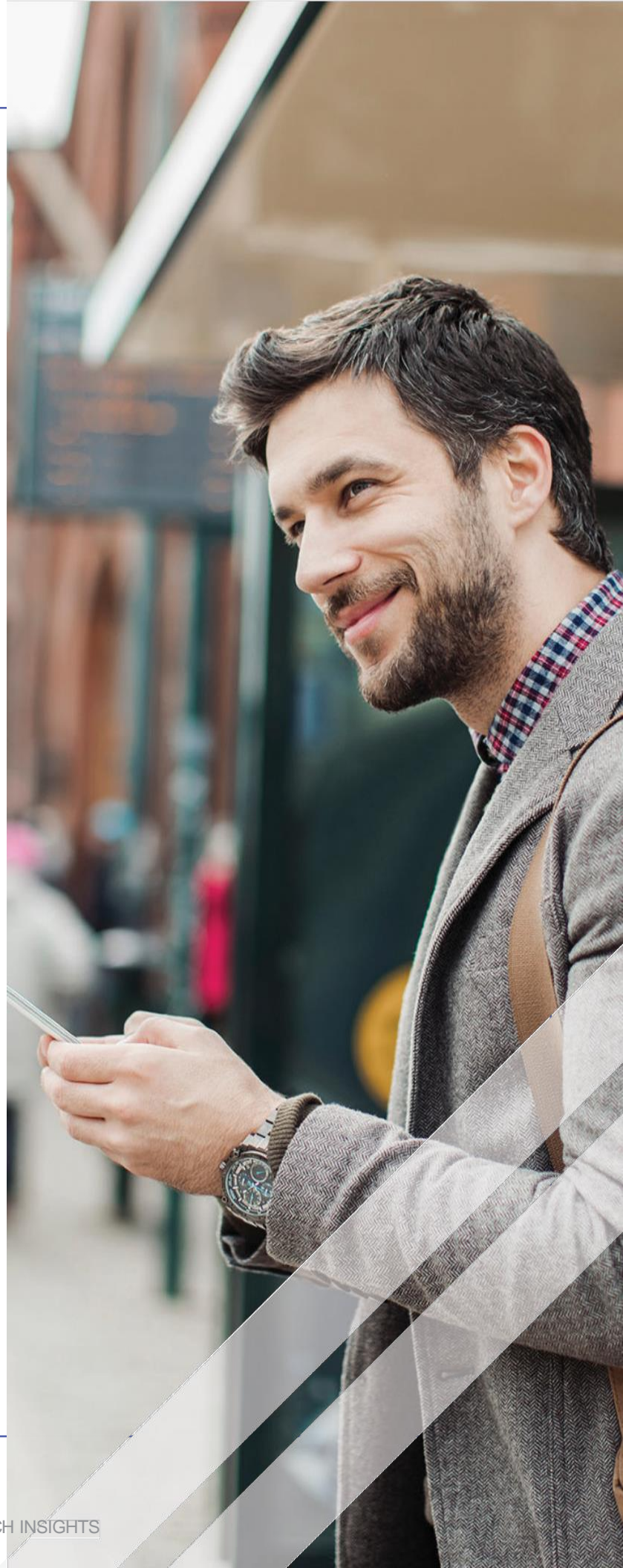
Step 5: Don't Forget About the End Points!

At this point, you understand what data you need to collect, where it will come from, who will use it and how they will use it. But collecting the right data in the right places is only half of the battle. Going back to the user stories, it's important to articulate where exactly the data needs to be surfaced for the use cases to come to life. Some examples include:

- Access to raw data for data scientists

- Customized API for software developers and enterprise clients

- Tables within a BI tool for analysts

- Attributes pumped into an activation system for marketers

- Attributes integrated with AI/ML-driven personalization engines on a website

- Editable profile data available for the customer to modify and augment.

The multitude of potential end-points for the data is where activation and insights happen, so clarity on these requirements is just as important as clarity on what data is collected. If these requirements aren't established up-front, surprises can occur later when systems for activation and insights aren't configured to ingest and surface the data as expected. The ultimate definition of success is when the end users find the multi-source data accessible, intuitive and enabling of all of their desired use cases.

In culmination, these 5 steps represent business requirements for multi-source insights. All too often this path is driven exclusively by the IT or data organization with only a high-level understanding of the business's need to bring data together for a complete view of the customer. The result is an investment that misses the mark or requires several enhancements to meet the business users' needs. By taking these steps up-front, insights leaders, marketers, CX owners and product managers will ensure a smoother path to the insights they need for smarter customer experience decisions.