Use a Customer Data Platform to create a better customer experience

A CDP is a useful tool that can help you create a better experience with …

- Engaging and relevant content
- Content and product recommendations
- Better navigation and search tools
- Personalization
- Customer privacy
- Customer support and feedback

In addition, the CDP can create a feedback loop to give your content and product creators key insights into your audience and their needs and wants.

Useful and relevant content

There's no one-size fits all for useful content because readers have different tastes and different needs from day to day. Some readers prefer a list of bullet points while others want a story. Some want an answer while others want a discussion.

Some publishers have tied their brand to a particular style of writing. The Atlantic is known for long-form journalism while Axios focuses on "smart brevity." That kind of distinctiveness might be a benefit or a liability. **Why not provide content in whatever format the audience wants?**

AI tools can quickly transform your long-form article into summaries and abstracts, infographics, FAQs, quizzes, action items, etc., and your CDP can track which type of article your reader prefers.

Imagine giving the reader control over how he wants the content presented! **Format may be a missing ingredient to our normal thoughts about "relevant" content.**

However, a CDP can be used for old-school "relevance" as well. More on that below.

Content recommendations

I can think of 20 different ways to do content recommendations …

- Popular articles on the site right now
- Popular articles in a specific category that the user has expressed interest in
- Popular articles by an author that the user has frequently read

… you get the point.

A CDP is a great tool for collecting the information to feed a content recommendation system. It doesn't have to be limited to web activity. Your CDP can also have info on how the person interacts with your emails, what seminars they've attended, what products

they've purchased, or other things that indicate interest. You can use all that to inform your content recommendations.

Content recommendations can be deployed on your website, but they can also inform your email newsletters and your campaigns on social media.

Think about the ways you might want to recommend content and make sure your CDP is able to help you with these different approaches to content recommendations. Sometimes the CDP can do the recommendations itself, but sometimes you need to feed the data to a recommendation engine.

Product recommendations

Analyzing preferences can help guide your product development. It might not be enough to look at your sales and create spin-offs from popular products. You might want to dig deeper to understand the characteristics of the people who are buying a particular product.

For example, you may sell the most of Product A, but you're selling Product A to a market you've saturated. Product D purchasers are in a new market that you'd like to enter.

By having all your customer information in one place, you can do deeper analysis to find new opportunities in hidden places.

Customized navigation

A common frustration with websites is the way they're organized. This is a challenge for the reader and for the web designer. The challenge is similar to building one of those phone trees to accommodate every in-coming call, but we've all had that miserable experience where the phone tree simply doesn't apply to our question.

What if you could give the reader a few different options, and default to the option that corresponds to their interests, or location, or job title?

Consider hiking. What I want to see in Maryland is very different from what someone in Wyoming wants to see.

As you collect information about your customers, you can customize how you present your content or products to be more relevant to them.

Personalization

One of the key functions of a CDP is to segment your audience, such as parents from children, teachers from students, or doctors from patients.

Segmentation can also help with your revenue models. For example, you might want to treat likely buyers differently than people who are just browsers. Segmenting the audience by their likelihood to subscribe can help publishers. Why spend your time trying to sell subscriptions to people who aren't the type to subscribe?

If you're a B2B software company with a suite of productivity tools, your market may include companies in various industries. There are different needs and regulations in each of those industries, so you've created different sales pitches for each audience. With proper segmentation, you can ensure you present the correct message to your prospects

based on what industry they're in – or by some other characteristic, like job title or function.

Follow your whales

My friend Rob Ristagno used to divide web visitors into barnacles, guppies, dolphins, and whales. The whales are your super-users. They buy your products, sign up for your e-newsletters, engage with your content, recommend it to others, interact with you on social media, etc.

A CDP can help you find those whales and then do two things.

1. **Examine their behavior**. It's often wise to find out what your best customers like and do more of that. A CDP can help. You can generate reports on what your whales are doing, and feed that back into the product or content pipeline.

2. **Get feedback.** Don't assume you can divine everything passively by looking at reports. Ask questions. With a CDP, you can show a question or a survey only to a specific audience — such as your whales.

A CDP plus a survey engine can be very useful. Give CredSpark a look.

Respond to customer preferences

This seems counter-intuitive, but some people believe that providing a summary at the top of an article increases engagement with that article. I have my doubts, because sometimes all somebody wants is the summary. You can use a CDP to test that theory, but you can also allow the user to pick whether or not they want the summary. You could also find the group for which the summary increases engagement and continue to show it to those people, and don't show it to people for whom it decreases engagement.

The point is that you can segment people based on their behavior or their stated preferences and then customize their experience.

Better omnichannel experiences

You'd like to have a consistent message for your audiences wherever they encounter you — on your website, in email, on social media, in your call center, and so on. You want every touch point to be informed by the data you've painstakingly collected on your customers, prospects, and leads.

A CDP provides the hub from which to do these things. You collect, clean, transform, and merge your data to create the mythical "single customer record," then use the CDP to orchestrate campaigns across different channels.

For example, you can push an audience from your CDP into Facebook and then coordinate what you say to that audience on your website and on Facebook. You can also send an email, a text message, or give them a call.

The CDP can drive all these things because you have all your customer information in one place.

Customer Journeys

"People like you also read this" is a good step towards personalization. You're helping your customer find the kind of content they probably want to read.

Sometimes the path to better engagement is more involved than that. You want to take them through a series of actions, such as from anonymous web visitor to white paper downloader to e-newsletter subscriber to paying subscriber. And you don't stop there. You want to keep your paying subscribers engaged with your content.

A CDP can help orchestrate this kind of customer journey. You look for certain characteristics to decide where people fall in each step of the journey. If somebody's already at step 3, you don't want to start them at step 1, and some people might go straight from step 1 to step 4. Your CDP can help you create campaigns like that.

However, anything that you can automate can go horribly wrong. Make sure to read my recent article on the Martech site about marketing automation.

Better customer support

You don't want your best customers to get frustrated with a long wait time with customer service. You can use your CDP to inform your call center of which incoming calls to prioritize so they go to the top of the queue. You can do the same with inbound emails.

The same can be done with online chat bots. If you know that one of your best customers is talking to the AI, you might have one of your customer service reps step in to that conversation.

Consider prioritizing your FAQs based on what you know about the customer's industry or preferences. If you know he's using an iOS device, put the iOS information at the top.
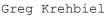
You can also use the CDP to orchestrate things like shipping updates, or delivery problems. You simply need to be able to connect the CDP to your shipping service.

Compliance and privacy management

Data and privacy compliance rules vary from industry to industry, and from location to location. Your CDP is a good place to manage that. You can allow your customers to set their preferences, and you can display different options based on their industry or geography.

Sincerely,

Greg Krehbiel

P.S. – If you're curious how a CDP might help your business, give me a call. I can help. I'm 100% independent. I do not accept referral fees. (But I could use the money!)