

Driving Omnichannel Personalization with Offline and Online Data

Powerful Customer Data Use Case Recipes for Driving Amazing CX





Create Winning Combinations of Flavors and Ingredients to Serve Personalized Experiences Across All Channels

To cultivate happy customers, it's essential to have the right flavors and ingredients to serve up personalized experiences that are consistent across all channels — both online and offline. But meeting customers' escalating — and constantly changing — expectations can feel hard for even the most skillful digital chefs, given the large number of engagement channels customers use.

All too often, each channel presents a unique view that presents only a piece of the customer journey, creating a fragmented and frustrating customer experience — not to mention an obstacle to advancing positive outcomes like retention, loyalty, and increased lifetime value!

Why do so many businesses still face this challenge in an era where omnichannel experiences are talked about so often? Ultimately, it comes down to lacking the right data. Without a strong data foundation, many customer-focused teams struggle with wrangling different data sources, as well as challenges in identity resolution that stall efforts to consolidate information across all offline and offline data sources. This prevents brands from generating a single, unified view of their customers that ultimately can be used to drive personalized, omnichannel customer experiences.

Give you an example of how this negatively impacts the customer experience, you say? Let's talk about one that many of us have been involved in: dialing into a call center.

Call center agents often lack accurate and current data on customers' online behavior because visitors on the website are often anonymous users who haven't logged in or provided their identity. When a customer's recent online behavior is not correlated with the phone call and visible to the call center agent, the interaction lacks personalization. But it doesn't need to be this way! Let's talk about a few use cases (ahem, recipes) where a customer data platform can help.

Recipe 1: Driving Personalization Across Offline and Online Sources

Problem

Every individual customer communication channel has a unique view of the customer, which can cause an inconsistent and uneven experience. This prevents you from delivering the omnichannel personalization your customers expect.

Solution

Leverage a customer data platform to unify offline and online customer data and drive personalized experiences across channels.



Example Lists

Ingredients	Web	
	Products favorites	Purchase history
	Email	
	Offline/POS	
	Preferred store location	Loyalty / rewards program membership
	In-store purchases	
	Mobile	
	App downloaded	Push notification status
	App launched	
	Login	

Kitchen Tools	Website
	Display advertising (DMP, DSP)
	Social media advertising
	Email marketing
	Analytics
	Point of sale systems
	Customer support tools

Your Lists

Ingredients	Web
	Offline/POS
	Mobile

Kitchen Tools	
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I want to... Leverage a single customer view for omnichannel personalization

In order to... Create consistent customer engagements across online and offline channels

Step 1 – Get Your Ingredients

To provide customers with personalized omnichannel experiences, let's look at how we can use a CDP to generate a single view of the customer, including both online and offline data sources, across lifecycle data. In this example we are unifying three sources of data:

- Offline data from a point of sale system
- Web data
- Mobile data

These three sources of data in combination give us insights into purchase activity, product engagement, loyalty level, etc. that can be included in the customer profile.

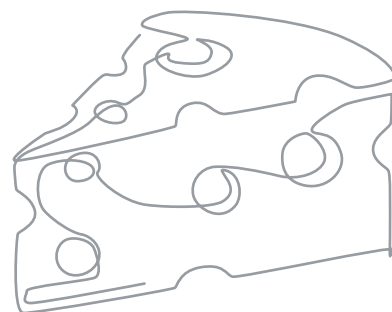
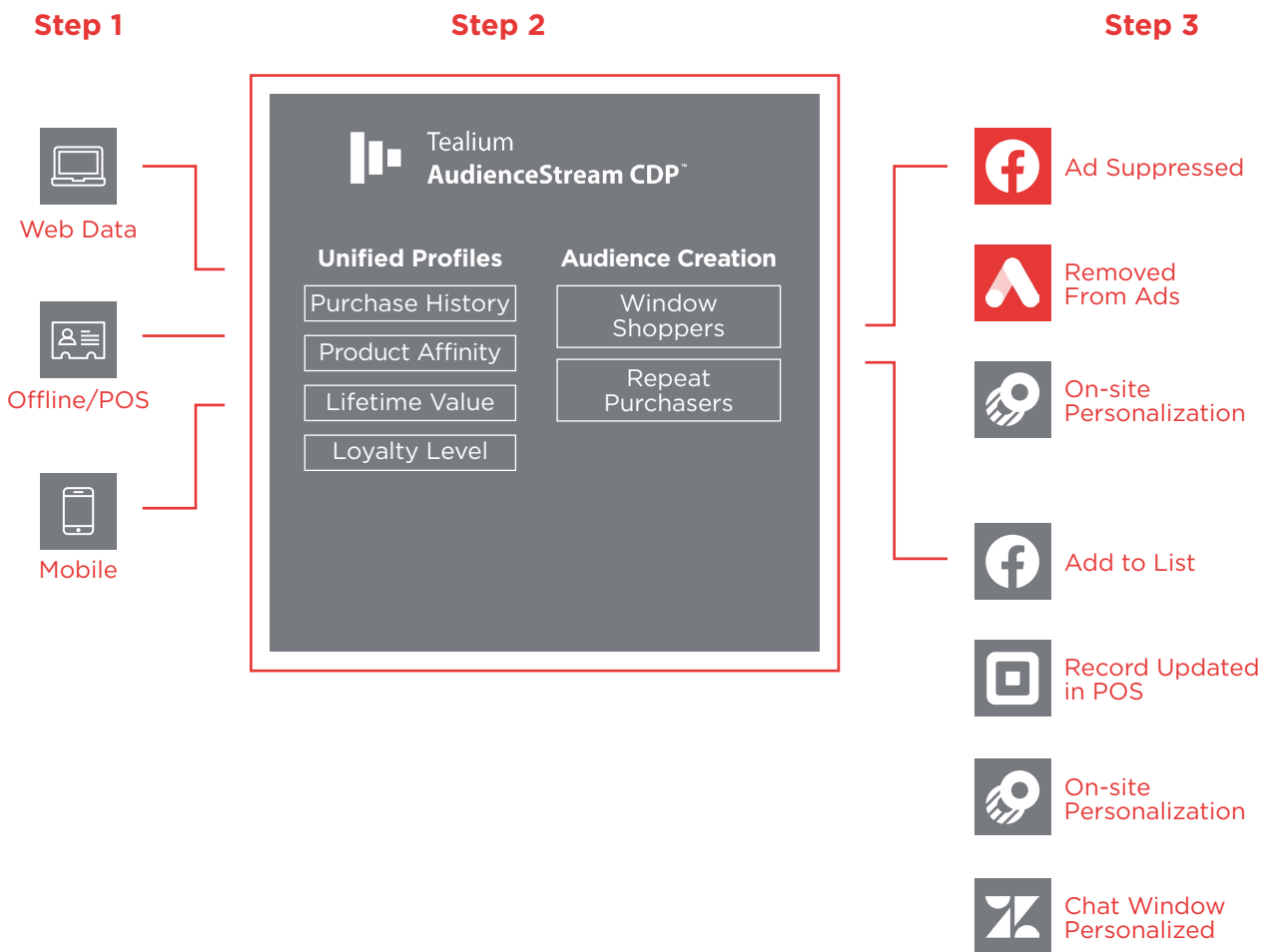
Step 2 – Organize Your Data Into a Profile

Next, these events are all stitched into a customer profile where insights can be generated and used in integrated channels.

Step 3 – Personalize Customer Support Interactions

Tealium AudienceStream CDP then enables you to take actions using these profile-based attributes to create unique audiences. With a portable and accessible single view of the customer, you can now operate with a truly 'customer-centric' approach across multiple engagement channels like advertising platforms, customer support systems, and even in-store mobile experiences.

Example Chart



Recipe 2: Personalized Customer Support/ Call Center

Problem

Every interaction a customer has in the call center is an opportunity to either forge a stronger, more profitable relationship by providing efficient and effective personalized service or create a frustrating experience that can increase churn and decrease revenue.

Solution

Leverage your CDP to blend online and offline data sources to provide a more personalized call center experience. Data from the outcome of the call center experience can also be leveraged to drive further action in integrated channels.



Example Lists

Ingredients	Web	Products favorites Customer LTV	Product searched
	CRM	Known customer Purchase history	Campaigns associated Email
	Offline/POS	Call center engagement history	Associate support tickets

Kitchen Tools	Website personalization Display advertising (DMP, DSP) Social media advertising CRM
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Your Lists

Ingredients	Web	
	CRM	
	Offline/POS	

Kitchen Tools	
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I want to... Improve customer support and leverage offline call center data to personalize customer experiences

In order to... Increase efficiency with my advertising budget and create better customer experiences

Step 1 — Get Your Ingredients

First, you need to be able to access customer data from multiple sources to deliver insights to call center agents. Using the capabilities of the Tealium AudienceStream CDP, you can collect data from multiple online and offline sources such as:

- **Digital channels:** Websites and apps for behavioral insights on things like interacting with particular ad campaigns, browsing particular content on the website, completing certain online conversions, etc.
- **CRM systems:** For demographic insights, transactional data, etc.
- **Call center data sources:** Where a unique phone number used can be tracked

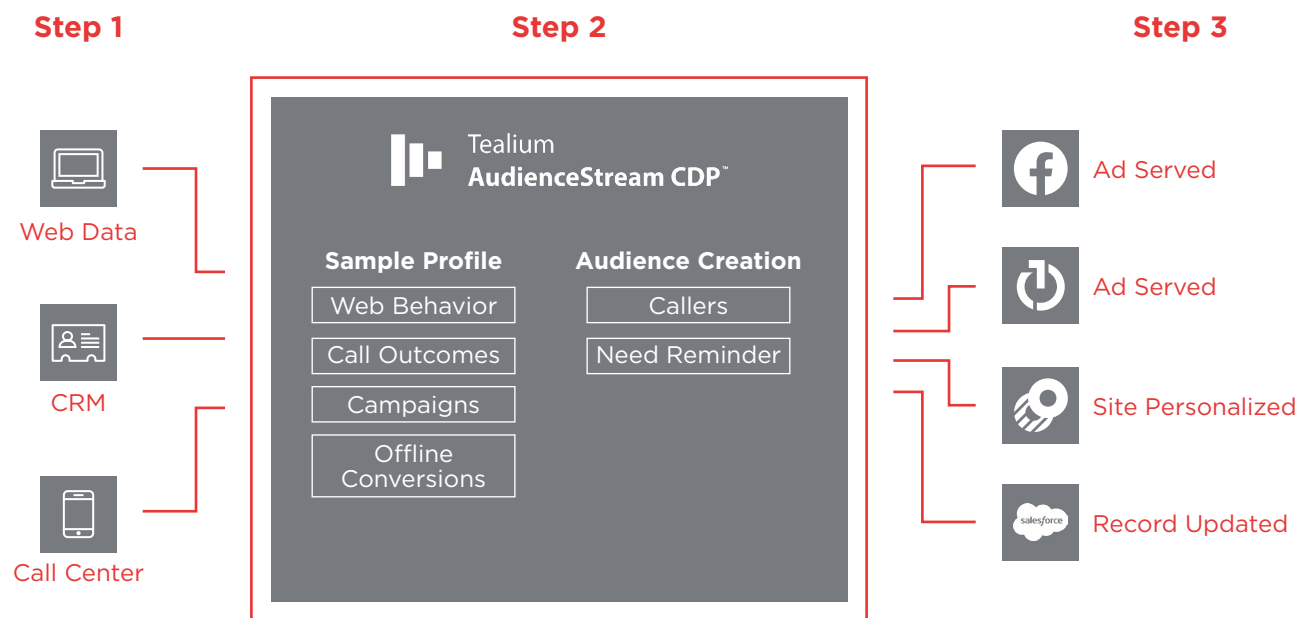
Step 2 — Organize Your Data into a Profile

Next, Tealium organizes this data and validates identity to build rich customer profiles and make them available to your tech stack. In our example, the customer's online behavior is tied to the phone call and sent to the CRM system to inform the agent's interaction with the customer based on real-time insights.

Step 3 — Go Beyond the Call

If you want to take this a step further, you can extract the outcome of the call and define additional audiences that you can then make available to other systems of insight in order to improve overall CX and further improve that customer's experience beyond the call.

Example Chart



Recipe 3: Location-Based Marketing

Problem

Marketing and analytics professionals want to be able to deliver location-based content, messaging and analytics especially around their store locations. However, location data on its own may not be useful enough to actually personalize the message or experience.

Solution

Use your CDP to combine location and behavioral data to deliver the right message at the right time.



Example Lists

Ingredients	Web	Products searched	Products viewed
		Purchases	Cart history
	Offline/POS	Preferred store location	
	Mobile	Location data	Push notifications opt-in
		App installed	
		Login history	

Kitchen Tools	eCommerce Site
	Display advertising (DMP, DSP)
	Social media advertising
	Email marketing

Your Lists

Ingredients	Web
	Offline/POS
	Mobile

Kitchen Tools

I want to... Combine location and behavioral data to send timely, targeted offers

In order to... Deliver location-based experiences and offers

Step 1 — Get Your Ingredients

Let's start where we always start, gathering the data needed to make our use cases come to life. There are a lot of interesting options when you combine location data with other customer insights, like customer personas, customer value, product ownership, etc. In our example, we'll look at triggering promotions and CX personalization based on (1) customer interests and (2) entering or exiting a physical store location.

For this recipe, we'll need to be able to collect location data which can be consented to from usage of a mobile app. Our campaign strategy calls for combining this data with customer interests, which we can get from the customer's behavior in-app and also on the website.

Step 2 — Build Your Ingredients into a Customer Profile

Next, we need to be able to resolve the identity of this customer so we can join data from their website visits with data from their mobile app usage. We can do this using data from purchases if it happens in both sources, or we could use logins to the app and correlate with their web behavior if they've signed up for a newsletter (using email as a common identifier).

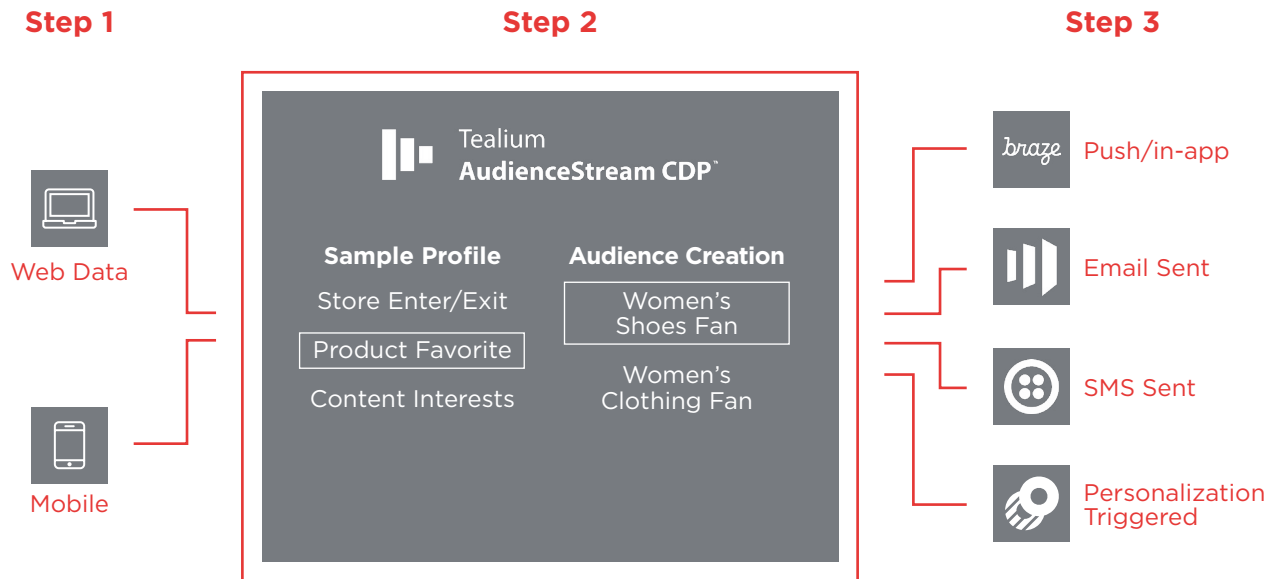
Once defined, identity resolves automatically in Tealium AudienceStream CDP and you can build in insights using the data from both sources to identify what kind of content the customer is interested in, what kind of products they've browsed or own, and you can see what stores they've visited, along with whether they are in a store, using the location data.

These attributes are then used to build audiences. In this case, let's say we know that our customer is a fan of women's shoes from her browsing behavior on the website and mobile app.

Step 3 — Orchestrate Campaigns For Timely Offers

The audiences you've now created allow you to orchestrate actions to this audience across multiple engagement channels. In this case, we can trigger a push message, email, website personalization and/or an SMS text message to these audiences, triggered by entering or exiting a physical store.

Example Chart



Real World Recipe Success

How the *Utah Jazz* Leveraged Historical and Behavioral Data to get a Full Court Press on Personalization

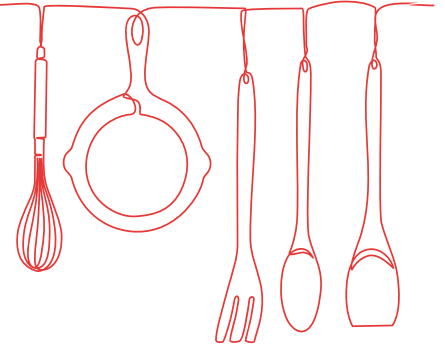
Before Tealium, the Utah Jazz (a professional basketball team) were able to run analytics on their web properties, but those insights remained siloed away from other business units. By combining a Tag Management System with a Customer Data Platform, the Utah Jazz were able to deploy two use cases that solved fundamental data challenges.

For a quick win, they could now use first-party data from their fans' web experiences to influence email marketing and sales outreach. Furthermore, they could now stitch together fan experience data with third-party platforms like Ticketmaster to gain a complete picture of the fan experience across their eight main channels. These changes allowed them to monitor performance and adjust spend in real time and set the stage for many of their future use cases.

After bringing their fan experience data in-house with a CDP, the Jazz looked to expand the reach of it through targeted marketing campaigns. At the time, 30-year season ticket holders received the same messaging as first-time fans. With a wealth of info from surveys, ticket sales, ticket scans, and sales reps, they leveraged their CDP to unify data to create new audiences for their campaigns.

These new audiences and campaigns included abandoned cart campaigns, generating in excess of \$100,000 in revenue each season; personalizing offers based on historic behavioral data (if a consumer attends games to see the visiting team, they only make offers for those games, for example); and implementing A/B testing based on insights gained from the CDP. The Jazz even ran simple A/B testing around making ticket recommendations.

The results: When visitors read an article with a ticket recommendation on their site, revenue per visitor increased 34% with that one simple change.





We Connect Data So You Can Connect With Your Customers

Tag Management • API Hub • Customer Data Platform and Machine Learning • Data Management

Tealium connects customer data—spanning web, mobile, offline, and IoT devices—so brands can connect with their customers. Tealium's turnkey integration ecosystem supports over 1,300 client-side and server-side vendors and technologies, empowering brands to create a unified, real-time customer data infrastructure. The Tealium Customer

Data Hub encompasses tag management, an API hub, a customer data platform with machine learning, and data management solutions that make customer data more valuable, actionable, and secure. More than 1,000 businesses worldwide trust Tealium to power their customer data strategies.

For more information, visit tealium.com

