

EBOOK

# Six steps to mastering the delivery of personalized experiences

Driving value from decisioning for your business





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## Goodbye yesterday's interactions hello decisioning

The era of price and product is over. The new battleground for customer attention is experience.

With the battle in full swing, brands are embarking on a frenzied dash for personalization. They want to live up to emerging customer expectations by delivering inspiring, exciting, and reassuring interactions that flex in the moment and leap from channel-to-channel.

Real-time, omnichannel and 1:1 have become the buzzwords of the moment, but one word is conspicuously missing: decisioning. It shouldn't be. Without it, this kind of smart interaction is impossible.

Get it right and it's not just customers who win. Brands that truly master decisioning stand to benefit from increased brand loyalty, marketing ROI, revenue and profitability.



## What is decisioning?

Boiled down, decisioning is a technique that blends data, rules and predictive analytics to make smart decisions about what to talk to customers about, on what channel, at any given time.

Marketers have been working with tech and data teams to optimize communications delivered in specific channels for some time. But they're only scratching the surface of decisioning's potential.

We see decisioning as something much more fundamental and ambitious. It's a technique that, enabled by huge leaps forward in AI and machine learning, stretches beyond channel boundaries to deliver smarter interactions across every touchpoint. Crucially, it sits at the heart of how a business creates, implements and refines customer strategy.

Getting it right is both an art and a science – a blend of organization, human ingenuity and technology – but it will drive wider business benefits that add value right across an organization.

### 2020:

The year customer experience will overtake price and product as the key brand differentiator.

– Walker

### 41%:

The number of consumers that switched companies in 2017 over a lack of trust or poor personalization.

– Accenture

### 8x:

The ROI personalization delivers on marketing spend

– McKinsey

- **Instant, accurate customer feedback:** decisioning constantly monitors how your customers are responding to your communications. Your marketing, data and operational teams will benefit from a granular view of the activity of each and every customer.
- **Super-charged agility:** decisioning facilitates rapid evaluation and improvement, leading to a new level of business agility and a quicker path to innovation.
- **Maintaining the balance:** decisioning empowers you to balance the needs of your business and your customer. You won't lose sight of what resonates with customers as you push through a business change, or your business objectives as you drive improved CX.



## Six steps to mastering decisioning

Decisioning can often seem like an uphill battle. Siloed data, outdated organizational structures, legacy technology, and a lack of clarity and collaboration around CX strategy can all stand in the way. But with the right knowledge, ambition and technology, anything is possible.

Here are our six steps to mastering decisioning for your organization.

1. Think big. Start small
2. Embrace “decision first”
3. Structure your business for CX
4. Treat decisioning as a system of operations
5. Get the right skills onboard
6. Get the right tools

### Step 1: Think big. Start small

It's easy to look at the sheer scale of what you're trying to achieve and not know where to start. That's why we're big believers in the power of starting small. Organizations used to build to change. Now they build for change. Lay the groundwork before you tackle the bigger questions.

#### Think about

- Adopting a start-up or disruptor mentality. Start with a small team ring-fenced from the rest of the business as a lightning rod to build the case for change. Make sure it has C-level backing.
- Embedding an agile test, learn, throw out, double down mantra that favors iterative approaches. Do it by giving early teams and projects the freedom to fail and prove out assumptions – fast.
- Starting with just one or two early use cases, aligned to existing strategic objectives. Agree what good looks like with critical internal stakeholders and communicate clear, tight metrics.



## Step 2: Embrace “decision first”

Take a “decision first” mentality. Focus your approach first and foremost on the needs of your business and your customer, unrestricted by how you’ve done things previously or what you perceive to be possible.

### Think about

- Who you’re talking to, and the best thing to talk to them about. Next best actions are those that add most value to the customer.
- Making sure your thinking is unbiased by old expectations and ways of working. Start with a clean slate, taking your customer and business objective as your start point.
- Developing early a clear, pragmatic view on how a decisioning model can be achieved collaboratively with key cross-functional stakeholders, who work together from day one.
- Developing a 12-month roadmap to move forward the most critical use cases with the highest potential ROI.

## Step 3: Structure your business for CX

Decisioning is backed by an organization structured around how customers think and behave. Those structures are focused on interconnected, flexible teams, each with a clear stake not only in CX, but also in a clearly defined strategy.

### Think about

- Whether your organizational structure mirrors the needs and behaviors of your customers, and how it helps or hinders joined-up CX approaches
- Assessing where your business is on the maturity scale: from entrepreneurial, experimental thinking on CX backed by good governance through to a business that is structured around an engrained decisioning first approach
- Drawing up a long-term plan for organizational transformation that eliminates siloes, removes overlapping or contradictory roles and objectives, and aligns the business under one CX strategy



#### Step 4: Treat decisioning as a system of operations

At its best, decisioning is completely in-tune with the needs of your business. You'll need teams, structures and processes to monitor results against a set of clearly defined KPIs, filter findings and recommendations up and down the business and commit to refinement on a continuous cycle.

##### Think about

- The structure, feedback loops and processes that will allow the continuous refinement of decisioning to reflect departmental and business-wide strategic objectives.
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- Embracing qualitative and well as quantitative data as you evaluate campaigns. How are customers and colleagues reacting?

#### Step 5: Get the right skills onboard

Decisioning requires a range of people and teams with an emerging set of skills. But as the full implications of it continue to unravel, businesses need to stay flexible.

##### Think about

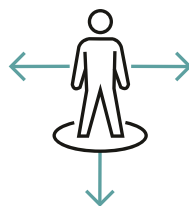
- Hiring marketers and IT professionals not for the skills they have now, but for their capability to learn and grow as expectations change.
- Blending marketing knowledge and technical know how. In our experience this empowers teams to move fast and develop a build, measure, learn philosophy.
- Recruiting "marketing technologists" into your teams of the future.

### Step 6: Get the right tools

Technology is the canvas on which decisioning plays out. You need the right tools to do a complex job, for a large range of internal stakeholders, now and in the future. Work out how prepared you are for decisioning by assessing your existing tech stack in the round.

#### Think about

- How to unify more than just data. While unifying data has become commonplace, most tools struggle to unify decisioning. If you want to deliver joined-up interactions across channels, select API-first tools that easily integrate into your stack and bring your business rules, logic and predictive analytics together in one place.
- Picking tools that “democratize” decisioning, giving everyone – whether data scientist or marketer – the ability to create, test and tweak decisioning models.
- How to future-proof yourself. Technology is in a state of constant change, so avoid vendor lock-in and keep your decisioning technology channel, model and logic agnostic.

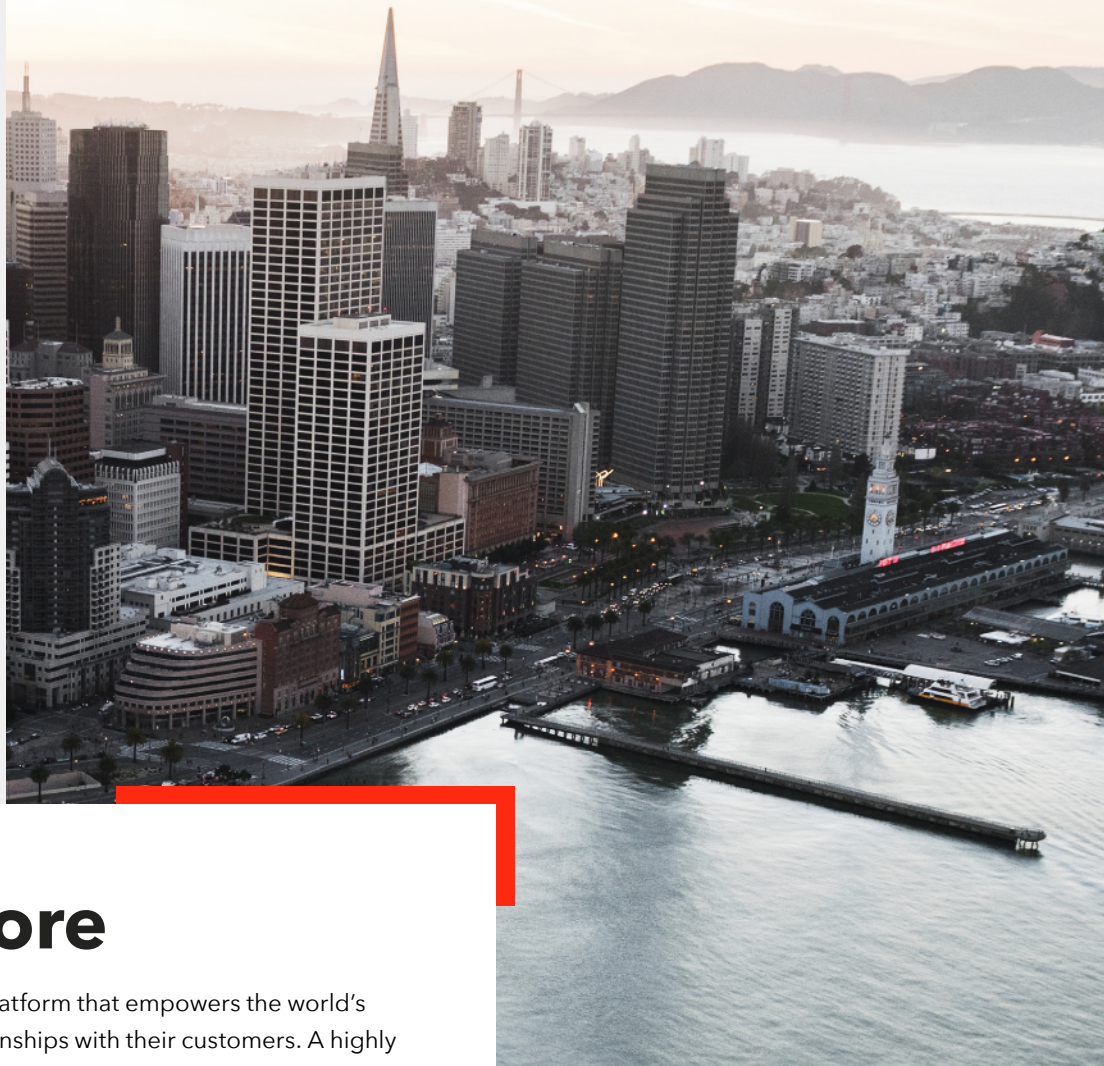


#### Decisioning in action

Our decisioning engine and services helped a leading consumer brand in the Americas deliver \$1m in incremental revenue within one week. In the longer term, improvements in customer experience have led to a 60% increase in Net Promoter Score.

### Taking the next step

We’ve helped some of the world’s biggest brands embrace decisioning and lead in CX, so whether you’re making your first steps or looking to improve an already successful formula, we’d love to talk.



## About Sitecore

Sitecore delivers a digital experience platform that empowers the world's smartest brands to build lifelong relationships with their customers. A highly decorated industry leader, Sitecore is the only company bringing together content, commerce, and data into one connected platform that delivers millions of digital experiences every day. Leading companies including American Express, ASOS, Kimberly-Clark, L'Oréal, and Volvo Cars rely on Sitecore to provide more engaging, personalized experiences for their customers.

Learn more at [Sitecore.com](https://www.sitecore.com)

## About Productive Edge

Productive Edge is a digital business consulting and technology solutions company that helps organizations and their leaders reinvent and transform their businesses with digital technologies.

Productive Edge accelerates digital outcomes by combining digital strategy, customer experience, and technology execution to deliver groundbreaking digital products and services.

Learn more at [productiveedge.com](https://www.productiveedge.com).

