

Assessing and Improving Your Customer Engagement Maturity

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Highlights

1

Fitting in to survive

5

Digital Clarity Group's customer engagement maturity model

9

The technologies of maturity

14

Conclusion: The guiding steps to maturity

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Executive Summary

In the face of rapidly changing conditions, organizations must adapt and transform their technologies, business processes, and skills just to stay relevant to their customers. Now that success—even survival—depends on building a base of devoted, enthusiastic customers, simply benchmarking and keeping up with the competition is no longer sufficient. Organizations must aim to achieve a level of customer engagement maturity that ensures their ability to create, nurture, and grow advocates and defenders of their brand and products.

Setting a path to customer engagement maturity requires the following:

- 1 Evaluating the current level of maturity of your engagement team, technology, and tact (strategy). Without knowing where you are today, there is no way to navigate to your desired destination.
- 2 Recognizing the role of content for customer engagements and taking steps to advance the level of maturity of your organization's content creation, delivery, and measurement activities.
- 3 Investigating, assessing, and selecting technology and service partners to fill the gaps in each of these three pillars if the necessary internal resources are not available or need support.

Fitting in to Survive

A full seven years before the publication of Charles Darwin's *On The Origins of Species*, the English philosopher Herbert Spencer coined the phrase “survival of the fittest.” Most people assume that this means that the strong are more likely to survive than the weak. But in fact, Spencer was referring to those that are most able to adapt and fit into a changing environment; “fittest” refers to those who are able to “fit in” the best. According to Spencer, adaptability is the key to survival—then and now.

The same principle applies to today's business world.


With technology and business conditions changing at an increasing rate and more and more channels competing to be the “next big thing,” knowing your customers and their tendencies will allow you to be there, wherever “there” is when they arrive. To stay ahead of today's digital evolutionary curve, companies now have to engage with their customers and build relationships that are dynamic, complex, and work across multiple channels. And for that, you need the right processes, skills, and technology.

Two primary forces have shaped contemporary engagement opportunities for digital marketers and customer experience professionals:

- Technology can now provide organizations with insight into more and more relevant information about their audiences. Powerful data about consumers—stated and implied preferences, shopping habits, social graphs, buying patterns, geographic and contextual information, support history—can be aggregated and considered in concert.
- Opportunities for reaching customers have expanded beyond the web to include hundreds of channels and devices. Organizations now have the ability to deliver targeted content in context—and customers increasingly expect it.

Taken together, these forces allow marketers and customer-experience professionals to create a far more complete view of the customer's needs, preferences, and context, and to respond with a tailored, highly customized engagement strategy.

“To stay ahead of today's digital evolutionary curve, companies have to engage with their customers and build relationships that are dynamic, complex, and work across multiple channels.”



Creating and managing such rich digital relationships requires advancing levels of engagement maturity that encompass the following:

- **The team.** The right people with the appropriate skill set, supported with effective and efficient processes, are essential to progressing down the path to engagement maturity. Partnering with external service providers is an excellent way to fill any gaps in the internal team's know-how or expertise.
- **The technology.** There is no charted map for the right technology mix to support customer engagement. The elements involved—content management, social, analytics, etc.—are highly dependent on the company and its target audiences. The key is that the systems in use are part of an integrated solution that works together to deliver the best digital customer experience.
- **The tact:** Setting a purposeful course of action with objectives and measurable goals is an important part of mapping the path to maturity. Ensuring that these plans include attention to all elements—resourcing, processes, technologies, training—and that they are regularly reviewed and adapted will advance the maturity level of both customer engagement and the organization as a whole.

Customer Engagement Maturity Model

At its core, successful customer engagement is about obtaining a thorough understanding of the customers and delivering just what they need or desire at precisely the right time. To do so, a company has to have the customer information organized and integrated, and to structure content creation, delivery, and measurement for real-time action.

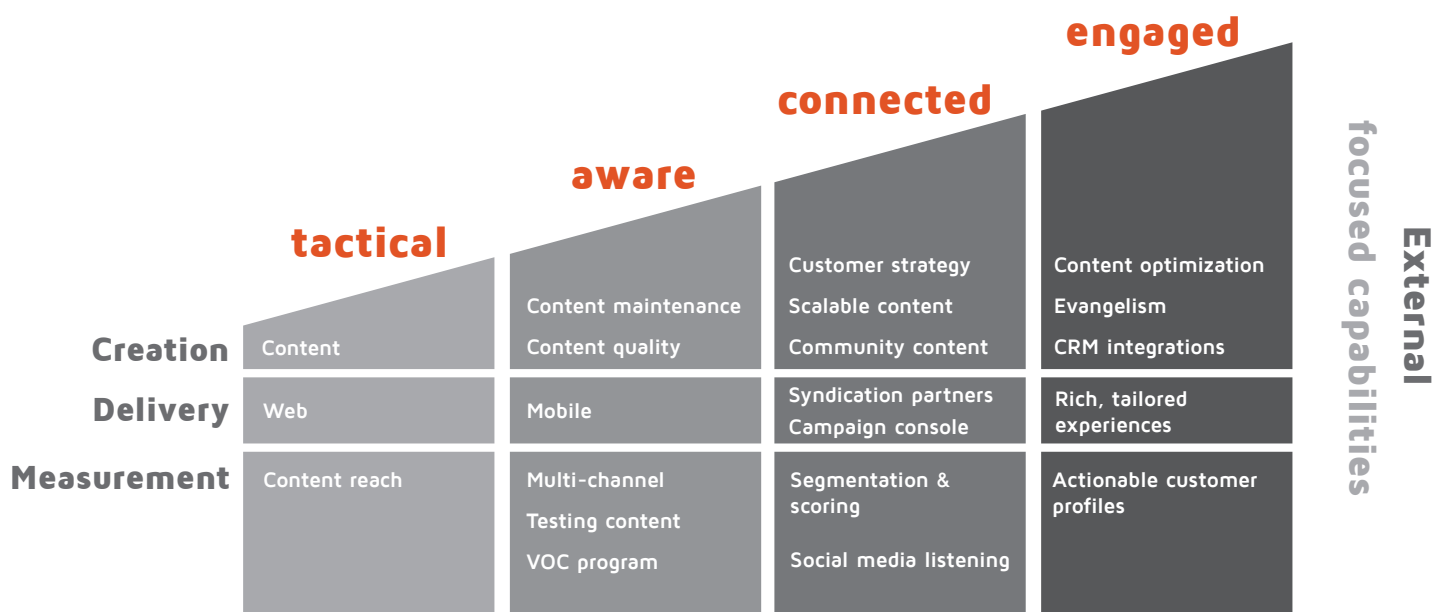
Digital Clarity Group's customer engagement maturity model charts organizational readiness through four stages: tactical, aware, connected, and engaged (see Figure 1). In the following section, we will review the characteristics and capabilities of each stage and explore some of the qualifying questions to ask to assess your organization's maturity level. Each stage

addresses three core areas involved in developing and executing an engagement and experience strategy:

- **Creation.** This stage considers how digital content is being generated, managed, maintained, sourced, scaled, and planned for across all channels.
- **Delivery.** Channels, sources, and sharing opportunities for your digital content are examined in this stage.
- **Measurement.** This phase involves scrutinizing the impact, access, sharing, and conversation surrounding your digital content.

Figure 1

Customer Engagement Maturity Model



Digital Clarity Group's customer engagement maturity model.



Stage 1: Tactical

At the earliest of stages of customer engagement, the focus is on the fundamentals of content creation, delivery, and measurement.

Typical characteristics of the tactical stage include:

- **Creation.** Simple content types (text, static images), limited content providers
- **Delivery.** Single-channel web publication
- **Measurement.** Site visitors, length of visits

Selected self-assessment questions:

- Is there a process in place for creating the necessary content to attract customers' attention?
- Do you have the means of delivering content to a list of potential and existing customers?
- Can you tell if the message is being delivered and received by its intended audience?

These fundamental technologies and processes will already be in place in most organizations. But they should not be taken for granted because they provide the indispensable foundation for the higher levels of maturity.

Stage 2: Aware

Achieving the next level of maturity requires another layer of involvedness between the technology and enabling processes, and the executing teams. At this stage there is a higher level of awareness and purposeful actions surrounding the content and channels in use, with more attention paid to its quality and upkeep. Here is also the time to extend content delivery to include mobile if it doesn't already.

Typical characteristics of the aware stage include:

- **Creation.** Editorial calendar, multiple content providers, web-ready (written for the web)
- **Delivery.** Multiple channels, including mobile
- **Measurement.** Visitor by channel, variant testing, customer-feedback mechanism

Selected self-assessment questions:

- Is existing content being actively maintained to remain relevant, while offering a robust blend of rich content that includes images, video, and text?
- Is a variety of channels, such as mobile and tablets, being leveraged with specifically optimized content for each?
- Do these channels create a two-way conversation between the company and its customers?



Stage 3: Connected

Once awareness is established internally within the affected teams, it is time to connect these resources and lines of business (LOBs) to pull together a cohesive plan for your organization's customer engagement. This is done via a cross-company strategy that leverages the analytics being gathered by different areas—sales, marketing, operations, and customer service—to optimize the digital experience for the customer. With this information in hand coordinated, multichannel campaigns can now be executed.

Typical characteristics of the connected stage include:

- **Creation.** Audience-specific content from across the organization, decentralized content processing, leveraging community-generated content
- **Delivery.** Campaigns, syndication partners
- **Measurement.** Actively monitoring social channels, combining and analyzing multiple sources of data, performing dynamic segmentation and scoring of user activity

Selected self-assessment questions:

- Is content being efficiently and effectively generated and maintained for all channels and LOBs? Is community content being actively captured?

- Have syndication partnerships been established to add greater depth and immediacy to the content?
- Are social media channels (Facebook, YouTube, Twitter, LinkedIn) being actively monitored for message management, as well as for opportunities to actively engage in related conversations when appropriate?

Finally, once the audience is connected and invested in not only what a company has to offer in products and/or services but also from an overall brand perspective, only then can they move on to the final stage of being considered engaged.

Stage 4: Engaged

Achieving an engaged stage of maturity involves both the target audiences and the internal teams to actively interact with the content and channels. Here, customers require and deserve a level of attention to detail (their details) that can only be achieved with a cohesive, multichannel, cross-LOB strategy that delivers a rich, tailored, continuous experience across all channels. Coordination of efforts and resources (human, technical, and financial) are complex at this stage of maturity and require a deeper toolbox of skills, technology, and processes.



Typical characteristics of the engaged stage include:

- **Creation.** Sourcing content from multiple sources to present in a single view to customers, collecting significant end-user-generated content (ratings, reviews, etc.)
- **Delivery.** Multiple, rich content types presented across channels; continuous user experience between devices
- **Measurement.** Holistic view and analysis of web, social, and transactional data to create 360-degree-view profile of customers

Selected self-assessment questions:

- Are you leveraging multichannel feedback to optimize presented content and offers?
- Are you attracting ample customer reviews, ratings, and comments to drive evangelism for the product/service?
- Is there extensive integration between the systems of record with the systems of engagement in use?
- Can you create actionable customer profiles based on acquired and analyzed interaction and transactional data gathered from all digital sources?

“Once awareness is established, it is then time to truly connect with the targeted customers.”

Technologies of Maturity

Reaching the engaged maturity level requires a strategic approach supported by an ecosystem of technologies, as well as a strategic service-partner network. In this section, we briefly discuss some of the enabling technology components of a digital customer engagement strategy, many of which may already be present in your organization today. Individually, the components of this ecosystem are powerful. The advanced levels of engagement maturity that are demanded to meet evolving consumer expectations require that these systems be increasingly woven together into a cohesive whole.

Targeting and personalization

Personalization and targeting engines are the frameworks from which the practice of delivering tailored, digital interactions is made possible. Personalization is the first principle of relevance and a cornerstone of a sound customer engagement strategy. Contemporary strategies assume the ability to customize the experiences of individual customers based on both their expressed and/or anticipated interests. Note that personalizing content for existing customers as a part of a digital strategy requires less guesswork than in marketing to prospects, given the access to existing history and data; however, the expectations of an existing customer are higher, and there are far more data sources to integrate. In either case, the belief on the part of the customer that the brand “knows me” is the critical initial step of engagement.

Web analytics

Web analytics is a critical component of any engagement and experience management strategy, and a necessary companion to web content management. To provide compelling, relevant content, the digital channel must first be able to perceive visitors’ interests. Web analytics enable brands to identify which content is being consumed by the general audience. This is valuable knowledge in its own right, but its most important role in an engagement strategy is to lend insight into the habits, interests, and needs of individual customers based on browsing history and other inputs. From a marketing perspective, a visitor’s history of content consumption provides hints into related products and services he or she may find compelling.

Marketing and email automation

Campaign management capabilities have become critical to a well-rounded digital strategy. Since both customer and prospects are interacting with companies across numerous digital channels, the ability to manage campaigns in a manner that ensures their consistency for each individual across these multiple channels is a core component of an engagement strategy. In addition to assisting with the operationalization of campaigns by automating workflows, managing leads, and segmenting the audience, leading tools now incorporate analytics and content management systems to provide contextual marketing, predictive analytics, and real-time-offer management across all digital channels. These tools can facilitate getting the right message to the right audience at the right time.



Search

Search is so ingrained in our daily lives that its evolution has gone relatively unnoticed, and as a business tool, it is often under-appreciated. However, search has become one of the most critical pieces of customer engagement success. Since its native inclusion in browsers, phones, and even television DVRs, search has become the de facto standard for how visitors arrive at a website, as well as the way they navigate the web property itself. A search box today is the digital equivalent of a store greeter asking, “How may I help you?” The answer can unlock the interests of the visitor and holds the key to providing him or her with relevant, compelling, valuable content in return.

A company’s ability to listen to these interests and respond appropriately is a critical business asset, but even more important is its ability to learn from these interactions over time. What are customers looking for? Did it seem hard for them to find? What can we learn about our audience and their related interests based on their combined search and browsing patterns? What did our customers say they were looking for when they arrived at our digital doorstep, and what did they ultimately buy, download, or read? Search lends insight into all of these questions and more. When well attended, a honed search engine will not only provide satisfying experiences for users by helping them find what they are looking for, but also serve as a critical source of customer interests and desires, an essential requirement for optimizing future customer interactions.

Translation and localization services

By definition, a well-tuned digital customer experience is mindful of the audience and its needs and can interact accordingly. There is no interaction—no exchange of information for value—if the participants cannot understand each other. Communicating with an individual in his or her own language is fundamental to a successful experience. Localization, then, is essential to relevance, a key requirement for a successful customer engagement. Services and technologies are available to assist with managing the localization process, and they are most effective in supporting a positive customer experience when they work in concert with formal content management practices and technologies.

Preparing content for consumption by regional audiences is a process that takes both language and cultural factors into account. Translation is often the most recognized element of localization, but communicating within the proper cultural context is often even more important than simply getting the words right in the local language. Customers and prospects tend to take well-localized interactions for granted. However, they certainly notice when localization is poorly done, or worse, not done at all. Failure to connect with local sensitivity can alter opinions or even eliminate the ability for customers to take part in what could have otherwise been positive experiences.



E-commerce

Customers need to be able to experience the products they are buying or services they are engaging online via rich, multichannel e-commerce interaction. This entails tying other engagement elements into the e-commerce solution, such as the integration of social with other customer ratings and reviews; localization via geo-specific imaging and language; and targeting and personalization that provide recommendations and related products based on past interactions and purchases. The purchase process should be supported with clear customer service options and reinforcement that the purchase was a positive one by giving back to the customer through interactions such as simple thank-you notification and the availability of loyalty programs and communities.

Customer relationship management

Customer relationship management (CRM), which is a business practice as well as a technology category, focuses on managing the information that stems from numerous interactions between a company and its customers in an attempt to manage the relationship in an orderly fashion. The processes surrounding these interactions include customer support and service, as well as sales and account management, among others. The ultimate goal of CRM is to improve customer satisfaction and maximize profits by consolidating information about each customer and by advising and streamlining many of the internal processes with the appropriate customer information. CRM clearly is a critical element of a customer engagement strategy, since much of the data about the customer resides

in the CRM system itself. This 360-degree view of information about the consumer has amazing potential for the customer's experience when coupled with information available within the digital marketers' toolkit and managed through a central content management system.

Social

Social is the interactive dimension of digital customer engagement. Social networking channels, such as Twitter and Facebook, serve as additional mediums through which both customers and prospects alike can communicate with and about the company, and the company can listen and respond in return. Likewise, social networks enable companies to communicate proactively with an audience that has expressed an interest and volunteered their attention by following, liking, friending, pinning, and more. Additionally, the enablement of user-generated content and sharing functionality within the context of a company's digital property has taken the notion of engagement to a whole new level. Figurative conversations have become literal ones and both marketers and customer engagement managers alike are able to get real feedback in ways they never could before.

The establishment of social media has also given rise to social monitoring platforms. Beyond the obvious marketing benefits, customer experience managers can now discover customer influencers as well as the perceived relationships between their content, services, and products. This information offers significant value to the company, allowing it to hone its positioning in ways that facilitate a common understanding

with prospects and customers alike. Additionally, companies are able to be nearly ever-present to provide support in case of a perceived #fail, and can likewise harvest critical information for product improvement directly from customers willing to share their product experiences.

Web content management

The web content management (WCM) system can act as the hub of the digital customer engagement wheel, marrying content and customer intelligence from the technologies and capabilities described above to deliver relevant, consistent messaging to customers

across multiple digital channels and destinations (see Figure 2). In some cases, the components are distinct products integrated together as part of a best-of-breed solution with WCM at the center. Alternatively, some vendors offer a WCM suite product with extensive functionality. There are a number of other technologies that could factor in as well, from the enterprise resource planning system to the help desk support system, but the commonality among all of them is content, as well as the need to deliver it at the right time in the right context to the right customer. Content is central to all phases of the customer engagement maturity model, making WCM systems a foundation to its success.

Figure 2

The Customer Engagement Ecosystem





Partnerships

Customer engagement maturity is an ongoing evolution that requires an array of knowledge, expertise, and experience to nurture and cultivate its growth. Engaging a service partner can help fill the gaps in the internal skill set—systems integration, UI, creative design, and project management/oversight. Partners come in various shapes and sizes, from systems integrators who focus on the technical side of the equation to the creative agencies who excel in visual design and graphics genius. Then there are the hybrid firms that can offer their clients a full spectrum of services: Often called interactive agencies, these companies have evolved to be able to offer their clients a “one-stop shop,” a full breadth of expertise to support a digital strategy from needs requirements and user research through design, implementation, go-live, and long-term strategy.

What experience and skill sets do your company need? Do you have a strong technical team but need support for the creative components? Or perhaps your brand and web standards are well established, but there is no dedicated technical team to implement or support the systems of engagement you are considering or have invested in? These are key questions that need to be answered before you can begin your search for the right partner.

Conclusion: The Guiding Steps to Maturity

The road to maturity is never smooth. As individuals, we stumble through the early learning years, then start to find our way through the awkward teenage years, before arriving, more or less, at a level of maturity that continues to evolve as we gain experience and adapt to the environment we find ourselves in at any point in time. Typically, we don't transition smoothly from one of these stages to the next; often, there are times when not everything is aligned.

The same is often true of organizational maturity. As you assess your current capabilities, you may find that your organization is at different stages of maturity in each of the three core areas of content creation, delivery, and measurement, or even straddled in between stages. That's to be expected. The task is to determine where you need to be in each area, prioritize the efforts needed to advance in maturity, and develop an action plan. The three guiding steps are as follows:

- Plan to advance to the next level of maturity relative to where your organization is in each of three pillars, and weigh your efforts accordingly.
- Investigate, assess, and select service partners to fill the gaps in each of the three pillars, where the necessary internal resources are not available or need support.

- Evaluate your current level of maturity against the model presented earlier with the three pillars of team, technology, and tact in mind.

“Customer engagement is an ongoing evolution that requires a changing array of knowledge, experience, and expertise.”



About DCG

Digital Clarity Group

With a global research-driven advisory team, Digital Clarity Group (DCG) helps business leaders navigate digital transformation in their organization. DCG works with its clients across four distinct themes – Consumer Engagement, The Social Enterprise, Innovative Change and Adaptive Technology. DCG provides independent research, customized consulting, events, and one-on-one executive advisory programs. DCG also provides guidance to technology companies and the service providers that implement their products to help deliver insight that can guide them to better strategic decisions and more useful products and services. For more information about DCG, visit www.digitalclaritygroup.com or email info@digitalclaritygroup.com.

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