



Data Driven Customer Engagement

Leverage data and analytics to identify and activate key engagement opportunities at every stage of the customer journey

Data Driven Customer Engagement Self-Evaluation



Name:

Organisation:

Job Title:

Date:

Understand				
	1 = Beginner	2 = Intermediate	3 = Advanced	4 = Leader
Customer Knowledge & Data	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Access to customer data.Basic customer profiling.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Access to transaction data.Ability to create target contact lists.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Access to demographic and transaction data.Processes to conduct data cleansing and matching.Tactics in place to improve customer engagement.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Have an actionable database.Consolidated data from multiple sources: demographic, transaction, marketing history and other behavioral data.Processes in place to optimise data quality and enrich data.Processes in place to continuously profile customers.</div>
	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Have financial reporting database</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Ability to access customer activity data.Ability to identify impact of customer activity to business outcomes.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Consolidate key customer activity and business outcomes in a chronological data storeAbility to attribute customer activity to target business outcomes</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Automated attributionComprehensive set of key customer activity and business outcomes in a chronological data storeAbility to apply various attribution models to different activities and outcomes</div>
Reporting	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Generate basic reports.Understand key success metrics.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Campaign performance reporting mart availableAutomatically generate reports.Ability to build reports and create custom metrics.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Manage any data to create live reports without IT intervention.Ability to build reports and create custom metrics.Use predictive models to support reporting and customer engagements strategies.Share reports, drill into different views and guide customer engagement strategy.Ability to forecast results of customer engagement initiatives.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Manage any data to create live reports without IT intervention.Ability to build reports and create custom metrics.Use predictive models to support reporting and customer engagements strategies.Share reports, drill into different views and execute customer engagement strategies.Automatically forecast the results of customer engagement initiatives.</div>
	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Generate basic reports to understand key success metrics.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Understanding of descriptive modelling for customer segmentationBespoke processes to create customer groups based on simple customer segments</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Dedicated data science workspace for analytical processingAbility to execute descriptive and predictive model processes for customer profilingFeature and analytical record data artefacts are centralised and shared</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Ability to automate analytical workflows for ongoing customer profilingMachine learning models self-evaluate and automatically re-calibrate over timeMonitoring and alerting of machine learning model performanceFeature and analytical record data artefacts are continuously re-computed</div>
Operational Strategy	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Marketing campaigns are only product-centric, outbound and reacting to market opportunities.IT constrains the process.Marketing is considered a cost centre rather than an investment.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Marketing campaigns are mostly product-centric, outbound and reacting to market opportunities.IT constrains the process.Budgetary consideration is non-existent.Marketing is considered a cost centre rather than an investment.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Engagement strategy is customer-centric and reactiveIT support works separately as an individual business unit.Have a clear understanding of impact from marketing on financial performance.Have a defined strategy for customer engagement</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Engagement strategy is customer-centric and proactiveMarketing have a separate IT budget for engagement strategies.Have a clear understanding of impact from marketing on financial performance.Well defined strategy customer engagement across all channels (inbound/outbound).</div>

Engage				
	1 = Beginner	2 = Intermediate	3 = Advanced	4 = Leader
Channels & Execution	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Deliver messages and capture response from a few channels.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Deliver messages in many outbound channels.Execute personalised experiences in a few channels in a decentralised manner.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Deliver messages in both inbound and outbound channels.Can introduce channels into customer engagement efficiently.Mostly centralised platform for customer engagement.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Efficiently engage with customers outbound, including mobile app push and social media.Have touch-points in inbound, including point of sale, social, call centre, and kiosks.Ability to execute marketing campaigns across multiple channels using a centralised platform.</div>
	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Scheduled delivery of campaigns.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Ability to execute campaigns based on customer actions in one channel.Ability to reporting on campaign performance to create insights for improvement.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Executing campaigns based on customer actions across a few channels.Ability to monitor campaign delivery, budgets, schedules and inform all teams involved in campaign management.Ability to reporting on campaign performance to create insights for improvement.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Trigger contextual, timely and relevant messages throughout the various stages of the customer lifecycle.Automatically reassign or generate new customer segments based on actions and behaviours of customers targeted by campaigns.Orchestrate multi-wave, cross-channel campaigns, with a high level of personalisation.</div>

Optimise				
	1 = Beginner	2 = Intermediate	3 = Advanced	4 = Leader
Campaign Optimisation	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Campaigns are reviewed on an ad-hoc basis.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Basic success metrics are in place to understand campaign performance.Campaign performance reports are used to improve customer engagement.Ability to refine and improve campaign creatives and deliverables.Run basic A/B testing to improve campaign performance.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Ability to constantly monitor, manage and improve marketing campaigns.In addition to reports, campaign performance results are actively used to refine and improve creatives, performance and deliverables.There are business rules that support decisioning and allow propositions and content to be delivered to specific customers.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Automated business rules and decisioning strategies are in place to select contextual, timely and relevant propositions for each customer.Run A/B testing to improve campaign performance.Run simulations on target segments, content, propositions and other rules.Processes in place to refine and improve campaign creative and deliverables.</div>
	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Campaigns not executed in real-time.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Campaigns not executed in real-time.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Ability to executed triggered campaigns in real-time.Have a repository of propositions and content that can be delivered across inbound and outbound channels in real-time.Deliver personalised offers based on customer profiles.</div>	<div><input type="checkbox"/></div> <div><ul style="list-style-type: none">Execute triggered campaigns in real-time.Have a centralised propositions and content that can be delivered across inbound and outbound channels in real-time.Deliver personalised offers based on customer profiles.Leverage analytics to automatically decision propositions and content based on campaign response.</div>

Self Evaluation	
Overall Rating	Notes

Customer Engagement Framework

Leverage data and analytics to identify and activate key engagement opportunities at every stage of the customer journey

Data-driven, customer-centric engagement

Your customers interact with your brand in a variety of places. In a single day, a customer may discover your business through an ad on social, download your app to browse products, and then decide to purchase something on your website or in-store.

This valuable data is siloed in disparate tools, making it difficult to understand exactly who your customers are and what motivates their actions. **Servian Engage CX** is a best-practice framework and methodology designed to leverage your data to:

- Consolidate and unify data across every touch point
- Run analytics to uncover how each part of the customer journey impacts your business
- Build actionable segments to personalise every customer interaction
- Activate engagements with sophisticated decisioning

Key Benefits



Understand how your customers engage with you across all touch-points in their journey



Observe and learn about customer behaviours and impact on business outcomes



Understand what, where and when interactions happen to identify engagement opportunities



Smarter, sophisticated audiences, decisioning and targeting

Get in touch to learn more

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