LTIMindtree

New Users to Advocating Customers: **A Five Stage Approach**

LTIMindtree

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1. Introduction

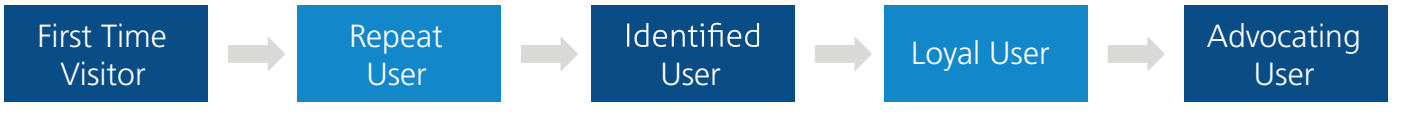
Automating and managing customer journeys - transforming anonymous users to loyal users - can be complicated, especially when there are multiple channels and devices the customers can interact through. Building effective SEO strategies, comprehensive customer profiles, creating segments, analyzing customer behavior, and running appropriate campaigns can often overwhelm organizations.

In our experience with working with several LTIMindtree customers, we have observed that an incremental approach to implementing customer journey management usually works better than a big-bang approach that often uses every new technology on the block.

In this paper, therefore, we propose an incremental, step-by-step approach for implementing customer journey management for your organization. We propose a model consisting of five stages. For each stage, we describe what are different dimensions that need to be considered.

2. Five Stage Approach to Handle Customer Journey

In this section, we will break down the customer journey into multiple stages and explore different dimensions of each step.



Each stage has been broken down into following dimensions:

1. Key objectives: what are the key objectives of that stage?
2. Information known: what do we know about the visitor?
3. Personalization techniques: what are the personalization techniques most suitable for that step?
4. Conversion techniques: what are the common conversion techniques most suitable for that step?
5. Tools and technologies: what are the technology tools and services you need to be able to achieve your objectives?

Note that there will be an overlap across dimensions, and that is okay. The idea is not to define water-tight boundaries, but to highlight the most important aspects of that dimension for a specific step in customer journey. Similarly, the personalization and conversion techniques, tools, and technologies described here are only some examples and not a super-set of all possibilities.

Another point to note is that sometimes, these stages may not be sequential and it is entirely possible that some stages are completely missing for some users. That is also okay.

Finally, note that for each dimension, there are several items listed. These are not exhaustive and should only be considered as an indicative list.

2.1. First Time Visitor

In this section, we will break down the customer journey into multiple stages and explore different dimensions of each step.

The first important step in a customer journey is to understand how visitors are finding your

business and then attracting them to your digital channels. Visitors can come to a website or mobile app from many sources, organically or inorganically, via search results, referrals, paid advertisements, social media, or email campaigns.

At this step, you have only very basic information about the visitor. This includes an approximate location and any information conveyed by the device or referring source.

This data can be used with search and display advertising to run campaigns and attract first time visitors. The following table summarizes the dimensions:

Key Objectives	Attract
Information Known	• Approximate location • Device ID and type • Visitor ID • Second and third-party DMP data • Notifications/subscription data • Referral data such as social media sites or web pages visited by the user
Personalization Techniques	• Advertisement targeting • Personalized content/recommendations based on search engine keywords • DMP stiches first and third-party data and define look-alike audience or personas which to be used for ad distribution to DSPs, ad networks, ad exchanges, and publishers • A/B Test and MVT can help to optimize the site or app, based on overall best performing content • Geolocation based or industry-based personalization
Conversion Techniques	• Build trust to encourage next action. This includes taking steps such as: • Using valid SSL certificates • Prominently displaying any certifications, details of affiliations, or testimonials • Ensuring consent and permissions are in place before asking any information • Regularly updating privacy policies and data collection policies • Running campaigns specifically for first time visitors to encourage them to visit again • Based on user's action during current session, messages, phone calls, or ads can be targeted with promotions and sign-up links to get him converted • Call to action like submitting a contact us form, take a subscription, watch a video, or read a blog etc. help anonymous users get engaged and eventually be converted • Subscription offer or first time user offer works well for generating leads • Request a call or connect through WhatsApp options are also popular for complex or costly service or products where the user shares email or phone number for further conversation • Client testimonials help to generate confidence to sign-up

Tools and Technologies	• Reports and metrics • SEO, SEM, PPC • Marketing campaigns • Landing pages • Channel analytics (web, mobile) • Beacons deploy • Server log tracking • Ability to get profile information from non-PII data • Lead management • DMP and DSP

Figure 1 Dimensions for First-time Visitor.

2.2. Repeat Visitor

For repeat visitors, you know additional information about their journeys and online behavior. As a result, you can target and engage with them better.

Customers interact with you across multiple channels and devices.

A recent LTIMindtree survey identified website, phones, in-store, and mobile apps as the key channels for researching travel purchases.

As a result, it is important to stitch together a unified customer profile based on interactions across several channels - both online and offline. Customers can interact with you via several channels such as:

Therefore, you need to be able to identify a customer across these different channels and then be able to stitch together a unified profile of every customer with details of their interactions across multiple channels.

The following table summarizes the dimensions:

Key Objectives	Engage
Information Known	• Approximate location • Device ID and type • Visitor ID • Second and third-party DMP data • Notifications/subscription data • Referral data such as social media sites or web pages he/she visited • Users' preferred actions or intentions based on his/her past customer journeys or behavioural pattern

Personalization Techniques	• Advertisement targeting • Personalized content/recommendations based on search engine keywords • Personalized content/recommendations based on action taken in past visits • Look-alike modelling and customize landing page • Promote or feature preferred channel of users • DMP stiches first and third-party data and define look-alike audience or persona which to be used for ad distribution to DSPs, ad networks, ad exchanges, and publishers • A/B Test and MVT can help to optimize the site or app, based on overall best performing content • Geolocation-based or industry-based personalization
Conversion Techniques	• Encourage registration with variable rewards • Inspire users with specific offers when he/she has shown interest in a specific product/service • Suggest to share contact details (email/phone) for further help or discussion • Based on user's action during current session, messages, phone call or ads can be targeted with promotions and sign-up links to get him/her converted • Call to action like submitting a contact us form, take a subscription, watch a video, or read a blog etc. help anonymous to get engaged and eventually converted • Subscription offer or first-time user offer works well for generating leads • Request a call or connect through WhatsApp options are also popular for complex or costly service or products where user shares email or phone number for further conversation • Client testimonials help to generate confidence to sign-up
Tools and Technologies	• Reports and metrics • SEO, SEM, PPC • Marketing campaigns • Landing pages • Channel analytics (web, mobile) • Beacons deploy • Server log tracking • Ability to get profile information from non-PII data • Lead management • DMP and DSP • Profile and segmentation • Look-alike modelling based personalization • Rules-based targeting • Personalization and/or Recommendation Engine

Figure 2 Dimensions for Repeat User.

2.3. Identified User

Conversion of a user from unknown to identified is a great milestone. There could be multiple drivers for a person to identify himself/herself:

- First step before making a purchase or availing a service.
- Need to initiate a personalized customer journey.
- Desire to get served better through managing preferences.

For an identified user, you can build a customer profile based on their digital behavior data or declared data, and further enrich it with identified psychometric insights, sentiment analysis, and propensity data to create a true holistic customer 360 view. Such a view allows you to tailor your campaigns and personalize them for each user. You can target users in real-time, and across channels.

The following table summarizes the dimensions for this stage:

Key Objectives	• Engage • Purchase • Upsell/cross-sell • Retain
Information Known	• Subscription data • Registration data • Customer profile • Customer declared data or derived data • First and second-party customer data • Contact information • Past buy, book, or transaction data • Anonymous as well as known profile attributes • User propensity • User psychometric data i.e. personality insights data
Personalization Techniques	• Identify user across devices and apply remarketing strategy with personalized contents and recommendation • Customer attribute or profile-based targeting to inspire with relevant, timely, and meaningful offers • Real-time display Ad targeting based on user's current online action • Preference management, marking content favourite • Remarketing ads for products customer had researched on or viewed earlier in a logged in identified state • Remarketing through social channels • Email remarketing • Campaigning through various channels based on response of earlier campaigns • Targeting based on psychometric profile and personality insight through CDP platform • Real time targeting and campaigning • Hooks canvas based strategies to make purchase as a habit

Conversion Techniques	• Ensure conversion or purchase is as frictionless as possible • Abandonment campaigns, such as cart abandonment for e-commerce or form abandonment for registration • Encourage to make another product or service subscription along with current one • Inspire customer to use the service or product on other channels • Encourage user to join Loyalty program emphasizing on advantages of the platform • Reward customers of various kind when customer joins the loyalty platform • Cross channel campaigning
Tools and Technologies	• Identity and access management • Anonymous to known profile stitching • Preference management tools • Audience manager • Targeted campaigning • Profile-based personalization • Display Ad targeting • Customer data platform • Journey orchestration or management platforms

Figure 3 Dimensions for Identified User.

2.4. Loyal User

Now that you've managed to convert an anonymous visitor into an identified customer, it is important to ensure you retain that customer for future business. Or to put it in another way, you need to make your business sticky and make it a habit for your customers. After all, if the customer feels connected, there is a higher possibility of him/her returning.

Wikipedia defines loyalty marketing as an approach to marketing, based on strategic management, in which a business focuses on growing and retaining existing customers through incentives. Marketing efforts designed to entice customers to make purchases again and again from a specific business.

A well-defined loyalty program is a good way to increase stickiness. Features like cashback, prepaid cards, custom wishes, talk to an expert, free personalized quote for new service, expedite shipping with no charge, request a free demo, recommendations only for you, personalized customer service etc. are an integral part of a properly designed loyalty program which makes the user feel important, who then joins the program because he/she feels it is value for money. Also, the program needs to innovate itself for better and more lucrative benefits without impacting the operational cost.

Let's take an example of a loyalty program in the airline industry. A loyalty program should not be limited to a specific area (e.g., just flight bookings), but must also include partners such as hotels and car rentals. Travel miles could be used for upgrading the current booking, or a small item like a coffee voucher can be offered. It can also be some offer during travel like - in flight Wi-Fi access using points or miles or buy a meal using some points. So, there are lots of innovative opportunities to build a meaningful loyalty system. Also, a loyalty system with various levels and benefits encourages a customer to go higher up. A community of loyal users of a brand can promote significant upsells and cross sells by favourable review.

The following table summarizes the dimensions:

Key Objectives	• Engage • Purchase • Upsell/cross-sell • Retain
Information Known	• Subscription data • Registration data • Customer profile • Customer declared data or derived data • First and second party customer data • Contact information • Past buy, book or transaction data • Anonymous as well as known profile attributes • User propensity • User psychometric data i.e. personality insights data • Loyalty data • Transactions made using loyalty points
Personalization Techniques	• A/B and MVT testing to identify engaging and winning experience • Gamification • Rewarding and engaging events • Effective personalized service around buy, shipping, and various kinds of transactions • Community building for loyalty platform members where customers can recommend products to others or share great purchase stories for people like him/her • Personalized customer service
Conversion Techniques	• Fast and performant channels • Highlight brand value • Interactive live chat • Promote relevant accessories for product bought earlier, through Bot recommendation • Loyalty point system and level definition with variable rewards to constantly inspire the customer for the next level • Bring innovative options to use loyalty points such as ability to buy through wallet or loyalty points • AR/VR experience to enable customer with first-hand experience even before buying • Easy to share review, comments, and get rewarded for review
Tools and Technologies	• Branding strategy • Performant CMS platform • Live chat • Accessible, automated and effective customer service channels • Testing and targeting • Progressive profiling • Predictive analytics • Recommendation engine • Social feedback, viral content strategy, social influencers

Tools and Technologies	• Loyalty platform • Customer Data Platform (CDP) • Customer 360 • Community (forum, blog) • Automated personalization • Hyper-personalization • Recommendation Engine • Digital Event Management Platform • Feedback mechanism

Figure 4 Dimensions for Loyal User.

2.5. AdvocatingUser

As a business, you want to see every customer of yours at the most matured customer relationship stage where he/she is happy to advocate your product and service to others. Every individual is a powerful social influencer in their own periphery and in today's hyper-connected environment, it is truer than ever.

As a business, you can create such an advocacy platform with varying rewards, propose encouraging benefits for referral programs, inspire users to share their stories and promote them in such a way that the user feels empowered and wants to go the extra mile for you.

The following table summarizes the dimensions:

Key Objectives	• Engage • Purchase • Upsell/cross-sell • Retain
Information Known	• Subscription data • Registration data • Customer profile • Customer declared data or derived data • First and second-party customer data • Contact information • Past buy, book or transaction data • Anonymous as well as known profile attributes • User propensity • User psychometric data i.e. personality insights data • Referral data • Social advocacy data • Social connection data
Personalization Techniques	• A/B and MVT testing to identify engaging and winning experience • Gamification • Rewarding and engaging events • Effective personalized service around buy, shipping, and various kinds of transactions • Community building for loyalty platform members where the customer can recommend products to others or share great purchase stories for people

	• Personalized customer service • Reciprocity persuasion • Referral programs
Conversion Techniques	• Advocating buy/book from specific brands • Testimonials • Share happy purchase stories • Hot hand phenomenon*
Tools and Technologies	• Customer advocacy platform • Referral program platform • Innovation management platform • Fan-centric social campaigning

Figure 5 Dimensions for Advocating User.

*Hot hand phenomenon
A phenomenon which stresses that a person who experiences a successful outcome, let's say from a previous purchase or a service availed before, from a specific brand, has a greater chance of success in future attempts too!

3. Conclusion

A key goal for a business is to build a long-term and effective customer relationship. Doing this helps it grow as well as brings more business through brand advocacy. However, doing this is not trivial and requires a lot of effort to constantly inspire and engage with users throughout their journey, starting from being an anonymous user to being an advocate for you. Your customers interact with you on multiple channels devices and therefore, building effective strategies, comprehensive customer profiles, creating segments, analyzing customer behavior, and running appropriate campaigns can often overwhelm you.

In our experience in terms of working with several LTIMindtree customers, we have observed that an incremental and iterative approach usually works better. This paper provides one such approach leading to potential success for our customers.

The following table presents a summary of the above discussion as a matrix for easy reference.

	Key Objectives	Information Known	Personalization Techniques	Conversion Techniques	Tools and Technologies
First Time Visitor	• Attract	• Approximate location • Device ID and Type • Visitor ID • Second and third party DMP data • Notifications/Subscription Data • Referral data such as Social Media sites or web pages she visited	• Advertisement Targeting • Personalized content/recommendations based on search engine keywords • DMP stiches first and third-party data and define look-alike audience or persona which to be used for ad distribution to DSPs, ad networks, ad exchanges, and publishers. • A/B Test and MVT can help to optimize the site or app, based on overall best performing content • Geolocation based or industry-based personalization	• Build trust to encourage next action. This includes taking steps such as: • Using valid SSL certificates • Prominently displaying any certifications, details of affiliations, or testimonials • Ensuring consent and permissions are in place before asking any information • Regularly updating privacy policies and data collection policies • Running campaigns specifically for first time visitors to encourage them to visit again • Based on user's action during current session, messages, phone call, or ads can be targeted with promotions and sign-up links to get him converted • Call to action like submitting a contact us form, take a subscription, watch a video, or read a blog etc. help anonymous to get engaged and eventually converted • Subscription offer or first-time user offer works well for generating leads • Request a call or connect through WhatsApp options are also popular for complex or costly service or products where user shares email or phone number for further conversation • Client testimonials help to generate confidence to sign-up	• Reports and Metrics • SEO, SEM, PPC • Marketing Campaigns • Landing Pages • Channel Analytics (web, mobile) • Beacons deploy • Server Log Tracking • Ability to get profile information from non-PII data • Lead Management • DMP and DSP
Repeat Visitor	• Engage	• Approximate location • Device ID and type • Visitor ID • Second and third party DMP data • Notifications/subscription Data • Referral data such as Social Media sites or web pages she visited • Users' preferred actions or intentions based on her past customer journeys or behavioral pattern	• Advertisement targeting • Personalized content/recommendations based on search engine keywords • Personalized content/recommendations based on action taken in past visits • Look-alike modelling and customize landing page • Promote or feature preferred channel of users • DMP stiches first and third-party data and define look-alike audience or persona which to be used for ad distribution to DSPs, ad networks, ad exchanges, and publishers. • A/B Test and MVT can help to optimize the site or app, based on overall best performing content • Geolocation based or industry-based personalization	• Encourage registration with variable rewards • Inspire user with specific offers when user has shown interest in a specific product/service • Suggest to share contact details (email/phone) for further help or discussion • Based on user's action during current session, messages, phone call, or ads can be targeted with promotions and sign-up links to get him converted • Call to action like submitting a contact us form, take a subscription, watch a video, or read a blog etc. help anonymous to get engaged and eventually converted • Subscription offer or First-time user offer works well for generating leads • Request a call or connect through WhatsApp options are also popular for complex or costly service or products where user shares email or phone number for further conversation • Client testimonials help to generate confidence to sign-up	• Reports and Metrics • SEO, SEM, PPC • Marketing Campaigns • Landing Pages • Channel Analytics (web, mobile) • Beacons deploy • Server Log Tracking • Ability to get profile information from non-PII data • Lead Management • DMP and DSP • Profile and Segmentation • Look-alike modelling based personalization • Rules based targeting • Lead Management • Personalization and/or Recommendation Engine
Loyal User	• Engage • Purchase • Upsell/Cross Sell • Retain	• Subscription data • Registration data • Customer profile • Customer declared data or derived data • First and second party customer data • Contact information • Past buy, book, or transaction data • Anonymous as well as known profile attributes • User propensity • User psychometric data i.e. personality insights data • Loyalty data • Transactions made using loyalty points	• A/B and MVT testing to identify engaging and winning experience • Gamification • Rewarding and engaging events • Effective personalized service around buy, shipping, and various kinds of transactions • Community building for loyalty platform members where customer can recommend products to others or share great purchase stories for people like him • Personalized customer service	• Fast and performant channels • Highlight brand value • Interactive live chat • Promote relevant accessories for product bought earlier, through Bot recommendation • Loyalty point system and level definition with variable rewards to constantly inspire the customer for the next level • Bring innovative options to use loyalty points such as ability to buy through wallet or loyalty points • AR/VR experience to enable customer with first hand experience even before buying • Easy to share review, comments, and get rewarded for review	• Branding Strategy • Performant CMS platform • Live Chat • Accessible, automated and effective Customer Service channels • Testing and Targeting • Progressive profiling • Predictive Analytics • Recommendation Engine • Social feedback, viral content strategy, Social influencers • Loyalty Platform • Customer Data Platform(CDP) • Customer 360 • Community (Forum, Blog) • Automated Personalization • Hyper-personalization • Recommendation Engine • Digital Event Management Platform • Feedback mechanism
Advocating User	• Engage • Purchase • Upsell/Cross Sell • Retain	• Subscription data • Registration data • Customer profile • Customer declared data or derived data • First and second party customer data • Contact information • Past buy, book, or transaction data • Anonymous as well as known profile attributes • User propensity • User psychometric data i.e. personality insights data • Referral data • Social advocacy data • Social connection data	• A/B and MVT testing to identify engaging and winning experience • Gamification • Rewarding and engaging events • Effective personalized service around buy, shipping and various kinds of transactions • Community building for loyalty platform members where customer can recommend products to others or share great purchase stories for people • Personalized customer service • Reciprocity persuasion • Referral programs	• Advocating buy/book from specific brands • Testimonials • Share happy purchase stories • Hot hand phenomenon	• Customer Advocacy Platform • Referral program platform • Innovation management Platform • Fan-centric Social Campaigning

4. Acronyms

1. DMP - Data Management Platform
2. CDP - Customer Data Platform
3. MVT - Multi-variant Testing
4. A/B - A/B Testing
5. SEO – Search Engine Optimization
6. SEM – Search Engine Marketing
7. PPC – Pay-per-click
8. DSP – Demand Side Platform
9. CMS – Content Management Platform
10. DXP – Digital Experience Platform
11. DAM – Digital Asset Management

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