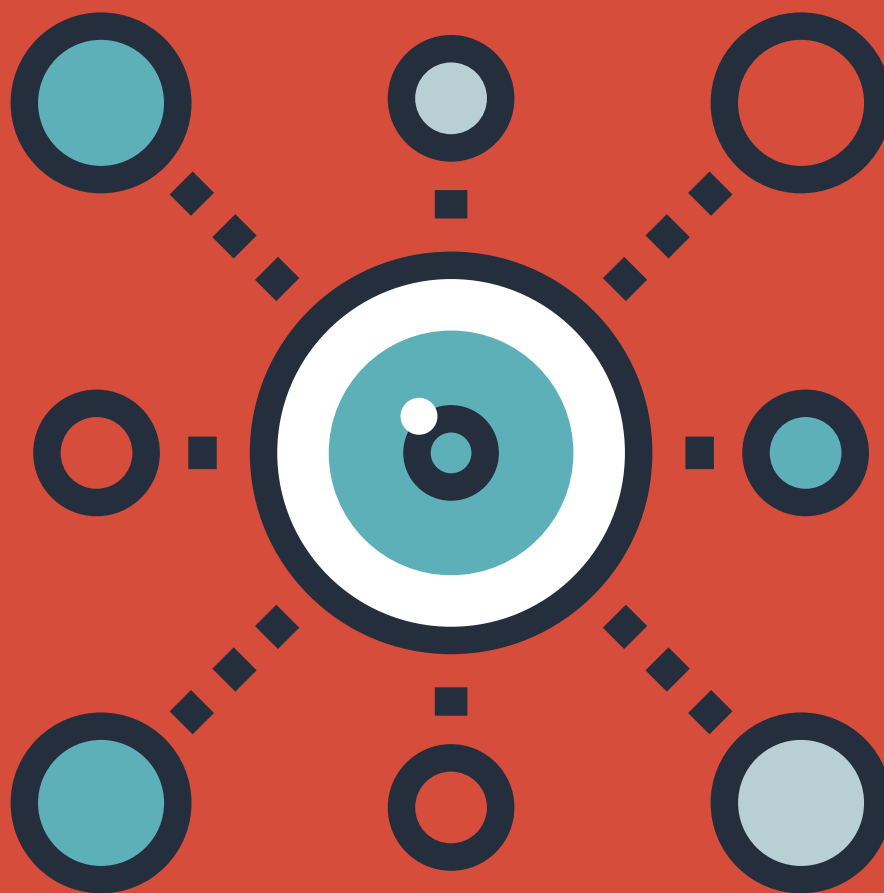


# OMNICHANNEL MARKETING EXCELLENCE

The growing role of  
customer data platforms



Executive summary	4
Methodology and framework	5
Foreword by BlueVenn	6
<b>Section 1.</b> CDP adoption and performance	7
<b>Section 2.</b> Outbound marketing	10
<b>Section 3.</b> Inbound marketing	16
<b>Section 4.</b> Owned media	19
<b>Section 5.</b> Cross-channel orchestration	23
Recommendations	26
Appendix 1: Respondent profiles	27
Appendix 2: Additional charts	29



## LONDON RESEARCH

London Research, set up by former Econsultancy Research Director Linus Gregoriadis, is focused on producing research-based content for B2B audiences. We are based in London, but our approach and outlook are very much international.

We work predominantly, but not exclusively, with marketing technology (martech) vendors and agencies seeking to tell a compelling story based on robust research and insightful data points.

As part of Communitize Ltd, we work closely with our sister companies Digital Doughnut (a global community of more than 1.5 million marketers) and Demand Exchange (a lead generation platform), both to syndicate our research and generate high-quality leads.

For more information, visit  
<https://londonresearch.com>



BlueVenn is a customer data platform and omnichannel marketing automation technology vendor, with over 400 customers worldwide and a 30-year history of providing its data-driven marketing solutions to B2C and B2B brands to improve their data management, customer analytics and cross-channel marketing capabilities.

BlueVenn empowers organizations to optimize their data-driven marketing potential with marketer-friendly customer analytics, segmentation and predictive modeling tools, underpinned by an optimized data foundation through its customer data platform, which unifies and deduplicates online and offline data across the enterprise to create a single customer view (SCV).

Uniquely for a CDP, BlueVenn has advanced customer journey automation tools to activate the SCV through the automation and orchestration of cross-channel, personalized campaigns, and consistently delivers millions in additional revenue for clients through measurable uplifts in cross-sell, upsell, retention and acquisition programs.

For more information visit:  
<https://www.bluevenn.com>

### ABOUT THE AUTHORS



**Linus Gregoriadis**  
Director,  
London Research

Linus, an experienced digital marketing and ecommerce analyst, is the co-founder and Director of London Research, which was launched in 2017. London Research is a sister company to Digital Doughnut, the world's largest community of marketers and digital professionals, and also to Demand Exchange, an advanced B2B lead generation platform. Linus previously spent more than a decade setting up and building the research function at Econsultancy, a digital research and training company now owned by Centaur Media. After leaving Econsultancy, where he oversaw the production of hundreds of survey-based trends reports, buyers' guides and best practice guides, he launched ClickZ Intelligence for B2B media company Contentive. Linus holds degrees from the University of Oxford and Cranfield School of Management.



**Andrew Campbell**  
Martech Director, Customer Experience Division,  
Home Agency

Andrew is a marketer at heart, but with a passion for designing and delivering technology-led marketing solutions that add value for consumers and deliver competitive advantage (and profits) to brand owners. He has more than 25 years of experience leveraging technology to deliver marketing goals, including executive management roles, both client-side and supply-side. He has a proven track record of helping to grow brands and businesses, translating marketing theory into improved bottom-line performance, developing marketing strategy, and delivering high-payback marketing programs. He firmly believes that brands need skilled, experienced marketers with the vision, creativity, consumer focus and technical literacy to deliver game-changing marketing solutions. Andrew has the grey hairs, youthful enthusiasm and professional ambition to ride these waves – and enjoy the thrill and exhilaration of it all!

## Executive summary

The Omnichannel Marketing Excellence report, produced by London Research in partnership with BlueVenn, explores organizational maturity across four key marketing pillars – outbound marketing, inbound marketing, owned media and cross-channel orchestration.

The research builds on the 2019 Customer Data Excellence report<sup>1</sup>, with a focus on the growing role of customer data platforms (CDPs) in the execution of effective marketing to meet business objectives.

The Covid-19 pandemic has only served to increase the importance of CDPs and identity management as part of the marketing technology ecosystem, with 78% of responding companies reporting increased traffic to their digital properties.

Key findings from our primary research include:

**CDPs are becoming mainstream.** The proportion of \$50m+ annual revenue companies with CDPs has increased from 51% to 63% since early 2019. CDPs are delivering return on investment, with those companies with CDPs more than twice as likely to have significantly outperformed against their main business goal in the 12 months leading up to the Covid crisis (32% vs. 14%).

**A seamless experience across online and offline channels remains elusive.** Only 9% of responding companies say they have engineered seamless experiences across online and offline channels, with website and ecommerce experiences integrated with other customer interactions. Companies' omnichannel marketing capabilities are being held back by a lack of C-suite responsibility for CX, leading to a more channel-centric rather than customer-centric approach to marketing. Only 17% of organizations say there is a dedicated CX team and ownership at executive level.

**Companies are getting better at mapping customer journeys.** Just under half of the companies surveyed (45%) are now using customer journey mapping in some form, however only a fifth (21%) say they are designing integrated, omnichannel customer experiences across the customer lifecycle and at every touchpoint. Furthermore, organizations with CDPs are almost twice as likely to have fully synchronized cross-channel communications that are coordinated over time and tailored to match consumers' needs (40% vs. 24% for non-CDP users).

**CDPs help to drive more advanced analytics and personalization.** The research shows the extent to which good data drives analytics, which in turn helps to power advanced personalization. Providing better access to all customer data is a primary use case for a CDP investment, therefore CDP users are more than five times as likely to be using advanced customer data analytics to support real-time or time-based triggered messaging and personalization (37% vs. 7% for non-CDP users). Similarly, they are more than three times as likely to say they personalize the website/ecommerce store using both offline and digital customer variables (23% vs. 7%).



This study offers a detailed snapshot of data-driven marketing maturity along several dimensions. The overall message is consistent: on measure after measure, around 20% of firms deploy the most advanced methods and reap the greatest rewards. Although a much larger portion – 63% – now report having a CDP, in fact just 19% report having the complete cross-channel customer view that a CDP is intended to deliver. Those firms are best positioned to deploy advanced analytics, personalization and synchronized customer journeys.

Not surprisingly, CDP users are much more likely than non-users to employ these advanced capabilities and to have outperformed their business goals. Clearly the CDP is a key enabling technology. While many other organizational and technical factors influence marketing maturity, it's almost impossible to do advanced marketing without having some type of CDP in place.

**David Raab**  
Founder, CDP Institute

## Methodology and framework

This Omnichannel Marketing Excellence report is based on a global survey of 235 organizations with annual revenues of at least \$50m. The survey, carried out in August and September 2020, was publicized through LinkedIn business networks and dedicated survey emails, sent out by London Research and its sister company, Digital Doughnut.

Respondents who qualified for the survey were those working client-side for organizations across a range of business sectors. The best-represented countries in the survey were the US (42%) and UK (38%). The first Appendix of this report contains further information about the profile of survey respondents, including annual revenues and company sectors.

Both the survey carried out for this research and the resulting report are structured around four dedicated pillars of omnichannel marketing excellence.

These four pillars correspond with stages 3, 4, 5 and 6 of last year's Seven-Stage Customer Data Maturity Model (Figure 1), with the focus of this latest research being very much on marketing execution.

Adopting this structure ensures a pragmatic approach, with actionable findings that relate to specific areas of omnichannel marketing capability and maturity. The premise is that marketers can use the research findings as a benchmark for their own omnichannel marketing maturity and a practical guide to improving their capabilities.



**Outbound marketing and media optimization**  
This is defined as 'push' communications that are initiated by the brand and delivered to audiences that meet their criteria.



**Inbound marketing and optimization**  
Defined as inbound marketing activity that promotes consumer-initiated interactions.

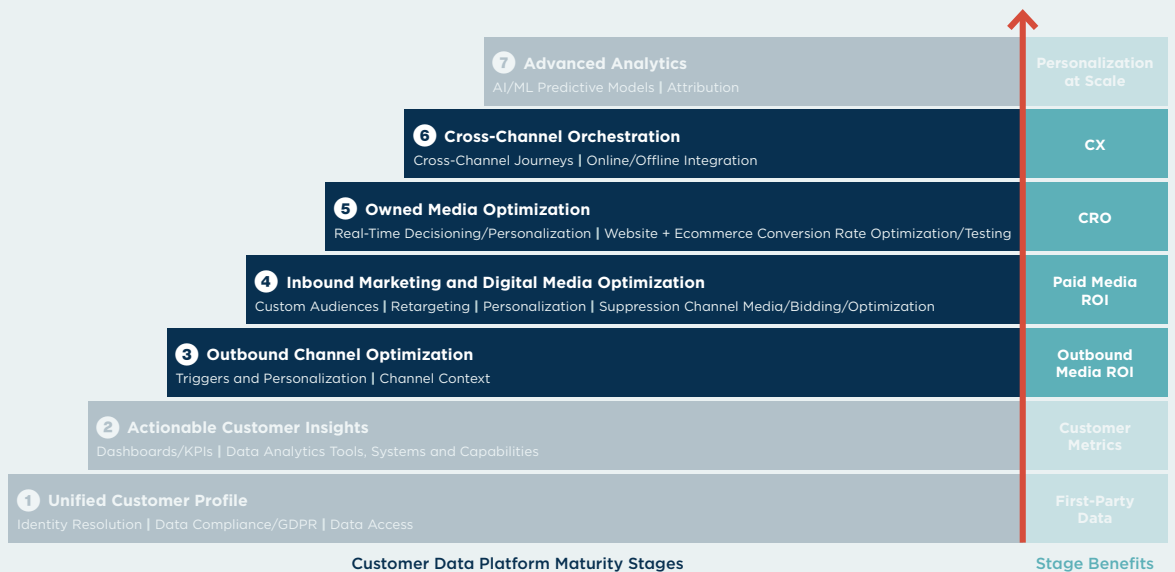


**Owned media optimization**  
Owned media is defined as web, mobile and social properties that support customer engagement and/or ecommerce.



**Cross-channel orchestration**  
Defined as coordinating and integrating customer journeys and customer experiences across all channels and devices (both online and offline, outbound and inbound).

**FIGURE 1**  
The Seven-Stage Customer Data Maturity Model



Source:  
London Research/BlueVenn

## Foreword by BlueVenn



**Steve Klin**  
CEO  
BlueVenn

This report from London Research plots how marketers worldwide are achieving omnichannel maturity and demonstrates a clear link between CDP investment and the over-achievement of marketing goals. It shows that CDP-equipped organizations are almost twice as likely (40% vs. 24%) to be delivering synchronized customer journeys across offline and digital channels, and three times as likely (30% vs. 11%) to apply integrated lead nurturing, scoring and conversion journey management techniques that respond to customer behavior. Furthermore, the responses suggest that CDP users personalize the entire brand journey, thus delivering the Holy Grail of an omnichannel customer experience, three times more often than non-users (23% vs. 7%).

These statistics aren't surprising, but a customer data platform cannot deliver this Holy Grail on its own. Doing so requires a transformation of data, people, technology, processes and culture. Our customers see BlueVenn's technology as a critical tool that not only assembles unified customer data to create a single customer view (SCV), but also ensures that every interaction with a customer, across all digital and offline channels, is informed and personal. This can only happen, however, when the whole business is aligned, enabling the CDP to activate that SCV across the entire business ecosystem (typically including email, SMS, mobile, web and DMP, but also CRM, POS, chat agents and beyond).

As a customer-centric data foundation, the CDP ensures that the website caters for past bookings and browsing history, call center agents can have informed conversations, sales assistants can make great recommendations, and marketers can email those same offers and recommendations based on all past interactions.

The path to omnichannel maturity is anything but straightforward, however. As this omnichannel maturity report shows, it will be some time before all organizations realize their omnichannel utopia. Companies are definitely getting better at mapping customer journeys, but only 9% are delivering seamless experiences across both their online and offline channels. In large part, this is due to a cultural barrier, highlighted by the fact that only 17% of organizations say they have CX representation at C-level. This failing will continue to obstruct many marketers from realizing their goal of omnichannel excellence, and means that marketing systems and processes remain fragmented and channel-focused.

Ultimately, a CDP is not just another database. It can become the key driver to transform or retrofit channel-centric, product-centric or offer-centric organizations into customer-centric ones, ensuring that customer insights, customer-facing systems, reports and execution channels all work harmoniously through dependence on a single source of customer truth. It helps marketers to foster human and digital interactions that will leave customers feeling that the brand knows them well enough to merit a long-term relationship.

I hope that marketers and C-level executives reading this report will start to consider some of the great recommendations on page 26, and that their businesses will be able to utilize this research to justify investments in customer-focused, omnichannel strategies, starting with the installation of a CDP at the heart of their CX strategy.

## 1

# CDP adoption and performance

The 2019 Customer Data Excellence report, also produced by London Research in partnership with BlueVenn, found that customer data platforms had come of age, with their usage highly correlated with business success and key attributes associated with customer data maturity.

This year's new research focuses more on the activation of customer data and CDPs to support omnichannel marketing. Our new research shows that the use of CDPs continues to increase, and that their correlation with business success is becoming even stronger. *Figure 2* shows a 12 percentage-point increase, from 51% to 63%, in the proportion of responding companies using a CDP, with many of those organizations that were planning last year to purchase this technology having apparently done so.

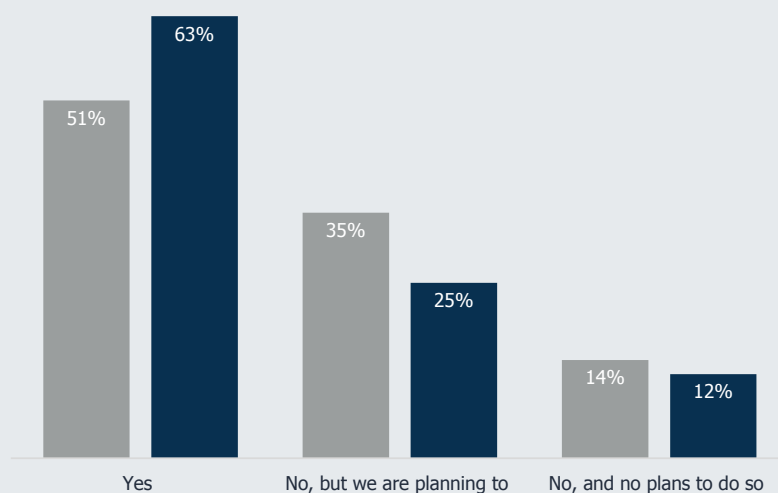
Although this is consistent with the growth in CDP adoption seen by vendors<sup>2</sup>, a word of caution is

needed. The adoption of true CDPs may not be quite as widespread as this chart suggests. According to the Customer Data Platform Institute, a CDP needs to demonstrate the following five capabilities to merit true CDP status:

- Ingest data from any source.
- Capture full detail of ingested data.
- Store ingested data indefinitely (subject to privacy constraints).
- Create unified profiles of identified individuals.
- Share data with any system that needs it.

The exact percentage is difficult to ascertain, but a significant proportion of survey respondents are likely reporting CDP usage when in fact their organizations are using more basic marketing databases, warehouses and CRM tools that do not meet the technical capabilities laid out by the Customer Data Platform Institute.

**FIGURE 2**  
Are you currently using a Customer Data Platform (CDP)?  
(All respondents.)



*The proportion of companies saying they use a CDP has climbed from 51% to 63%.*

● 2019  
● 2020

**FIGURE 3**

In respect of your organization's main marketing focus, did you achieve your main goal in the 12 months preceding the Covid crisis? (CDP vs. non-CDP users.)



*Those companies with a CDP were significantly more likely than companies without to have 'significantly outperformed' in the 12 months before the Covid crisis.*

- Organizations using a CDP
- Organizations not currently using a CDP

The challenges marketers face in delivering significant return on investment from their customer data platforms is reflected by the latest Gartner Hype Cycle for Digital Marketing<sup>3</sup>, which places CDPs firmly in the 'Trough of Disillusionment' after a period at the 'Peak of Inflated Expectations'.

If companies are to reap the benefits of their investment in technology, they need a coordinated program of change management covering CX design, data strategy, analytics, personalization, content management, journey orchestration and campaign optimization.

Encouragingly, our 2020 research suggests that CDP users have been meeting these challenges of implementation head-on, and winning. In the 12 months preceding the Covid-19 crisis, those companies with a CDP were significantly more likely than companies without CDPs to have 'significantly outperformed' in relation to their main business goal (32% vs. 14%, Figure 3).

Furthermore, the skew towards significant over performance for CDP users in relation to the main business goal has increased from 24% to 32% since our last survey (see also Appendix 2, Figure 29).

It is this effective deployment and enhanced performance that will see CDPs move into what Gartner describes as the 'Plateau of Productivity', where businesses can realize significant, lasting returns – as well as create enhanced experiences for their customers.



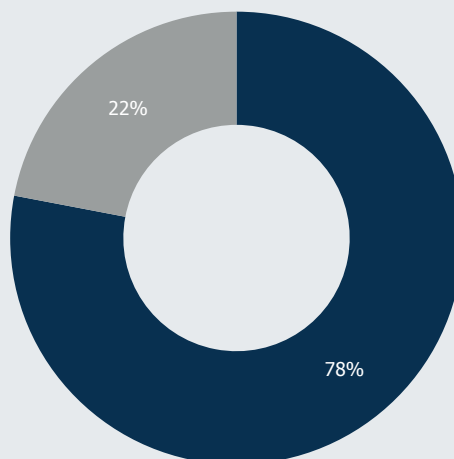


The coronavirus pandemic has accelerated the shift online, with 78% of responding companies reporting increased online traffic.

Of course, 2020 has been anything but normal for most businesses, and the landscape has changed considerably for almost all companies, mostly for the worse but in many sectors for the better, often because of increased digital engagement and transactions.

The coronavirus pandemic has accelerated the shift online, with 78% of responding companies reporting increased online traffic (*Figure 4*). This provides a clear opportunity for omnichannel brands to respond to consumer needs through the consumer's channel of choice, whether this choice has been driven by preference or necessity.

**FIGURE 4**  
Have you noticed an increase in online customer interactions and purchases during the Covid crisis? (All respondents.)



Almost four in five (78%) of the companies surveyed report an increase in online customer interactions during the Covid crisis.

● Yes  
● No

## 2

# Outbound marketing

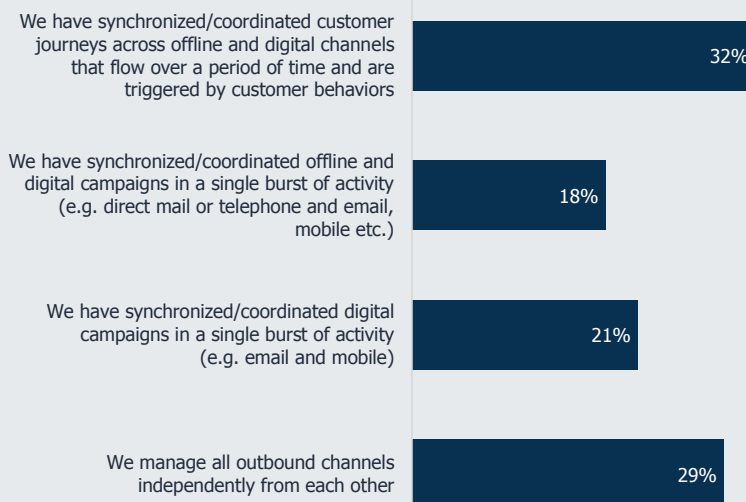
Outbound communications are the focus of the first of the four key pillars that we have identified as being essential for any organization seeking to improve its omnichannel capabilities to master.

These are push communications initiated by the brand and delivered to audiences identified as relevant, for example a mobile app push notification, targeted direct mail or an outbound email campaign or offer. The ability to target the existing, addressable customer base using outbound channels – both digital and traditional – is a baseline marketing requirement of any brand.

Ongoing dialogue and interactions, designed to sustain a long-term relationship with customers across the lifecycle, are increasingly becoming table stakes for organizations seeking to differentiate through a truly omnichannel customer experience.

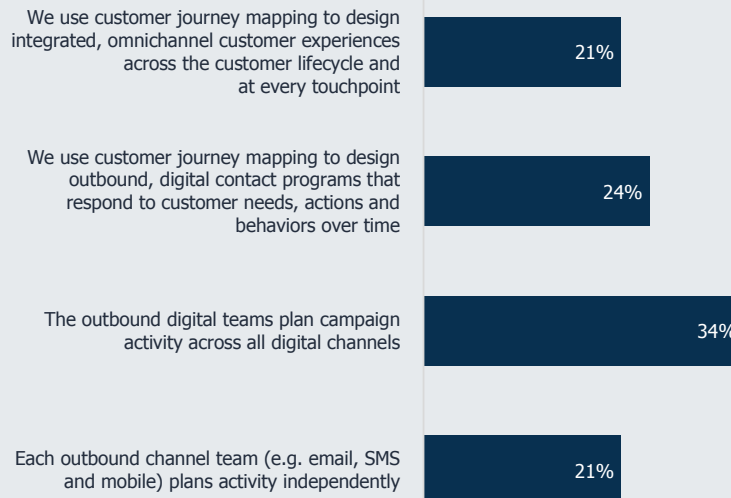
The first of our maturity charts (*Figure 5*) reports the extent to which responding companies coordinate customer communications across multiple digital and offline channels. Nearly a third (32%) of organizations are at the top of the maturity spectrum, delivering synchronized communications across all online and offline channels that are sequenced over time and triggered by customer behaviors. This leaves a much higher number of marketers (68%) admitting to delivering single bursts of campaign activity, with varying degrees of synchronization or integration of channels.

**FIGURE 5**  
How well do you coordinate customer communications across multiple offline and digital outbound channels? (All respondents.)



Nearly a third (32%) of responding organizations say they deliver synchronized customer journeys across offline and digital channels.

**FIGURE 6**  
How do you plan  
your outbound  
communications?  
(All respondents.)



*A fifth (21%) of companies use customer journey mapping to design integrated, omnichannel customer experiences across the customer lifecycle.*

Outbound channels might include direct mail, call centers, mobile, email and display ads that are integrated and triggered when a customer takes a certain action.

Those classifying themselves at the more sophisticated end of the spectrum are multichannel outbound marketers, running choreographed 'push' campaigns, who can realistically look to extend this approach across inbound channels.

At the bottom of the maturity scale are those 29% of responding organizations who say they manage all outbound channels independently of each other. These are companies for whom different channels exist as silos, with coordinated outbound marketing being subsequently beyond their grasp.

### Customer journey mapping

Figure 6 shows the maturity of outbound communications in respect to customer journey mapping. Just under half of the companies surveyed (45%) are using mapping in some form to design higher-order, joined-up, outbound programs. This group includes around a fifth (21%) of companies in the most advanced camp, who are designing 'integrated, omnichannel customer experiences across the customer lifecycle and at every touchpoint'.

The remaining 55% of companies, who are not using more advanced communication planning techniques, need to address this omission if they are to develop more integrated outbound programs as part of their omnichannel maturity.

This 45:55 split between mature and less mature businesses can be characterized as the difference between a customer-centric and channel-centric marketing approach. Perhaps the greatest benefit of employing customer journey mapping as a communications planning tool is that it places the customer at the heart of the planning process and frames everything around their needs, behaviors and attitudes.

From a practical point of view, customer journey mapping provides a mechanism and framework to overcome the channel-defined organizational silos in a business. It allows all stakeholders to innovate and collaborate around the needs of the customer. Channel-centric thinking and planning is the biggest obstacle to designing and delivering an omnichannel marketing program.



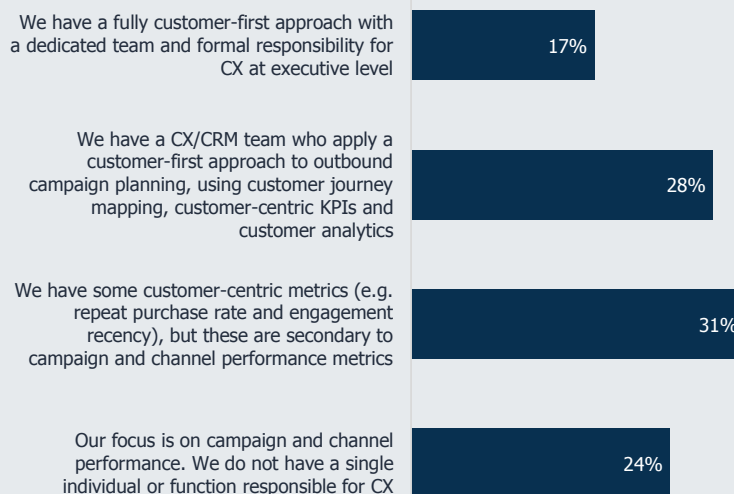
Senior level buy-in is not just a vanity consideration, but rather about the practicalities of strategic change management or business transformation – cultural and structural – across the enterprise.

#### C-suite backing for CX

It is clear from *Figure 7* that CX still has some way to go to become a top table, C-suite consideration. Only 17% of companies have a dedicated team and formal CX responsibility at executive level. Senior level buy-in is not just a vanity consideration, but rather about the practicalities of strategic change management or business transformation – cultural and structural – across the enterprise. Truly omnichannel customer experiences, and the technology and data that underpins them, require cooperation across business functions, including marketing, sales, finance, operations and IT.

We have cited the practical benefits of customer journey mapping as a key tactic in promoting customer-centric planning. However, this 'bottom-up' coordination across channel teams will only flourish with clear 'top-down' direction and, ideally, hands-on, direct participation, from an executive-level sponsor. Clearly, executive-level business ownership is a critical factor in driving the scale of change required. A focus on campaign and channel metrics, with no single individual or function responsible for CX (as reported by 24% of respondents), will simply not cut it.

**FIGURE 7**  
Who is responsible for the customer experience in your organization?  
(All respondents.)



*Only 17% of companies say they have a fully customer-first approach with a dedicated team and formal CX responsibility at executive level.*



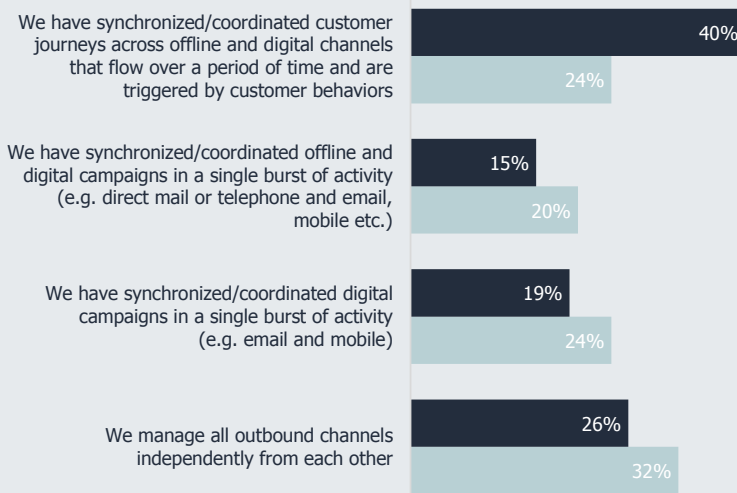
Those organizations with a CDP are three times more likely than non-CDP users to have a fully customer-first approach, with a dedicated team and formal responsibility for CX at executive level (23% vs. 7%).

**CDP vs. non-CDP**

CDPs are a key enabler for fully synchronized cross-channel communications that are coordinated over time and tailored to meet consumers' needs. As can be seen in *Figure 8*, 40% of CDP users cite this capability, compared to only 24% of non-CDP users. More than half (56%) of companies without CDPs are still more channel-focused, which limits their ability to be omnichannel.

Ownership of a CDP won't in itself ensure customer centricity, but it is clearly an important part of the mix, supporting a shift from channel-centric to customer-centric marketing. Those organizations with a CDP are also three times more likely than non-CDP users to have a fully customer-first approach, with a dedicated team and formal responsibility for CX at executive level (23% vs. 7%, see *Appendix 2, Figure 30*).

**FIGURE 8**  
How well do you coordinate customer communications across multiple offline and digital outbound channels? (CDP vs. non-CDP users.)



Companies with a CDP are 67% more likely to have synchronized customer journeys across offline and digital channels.

- Organizations using a CDP
- Organizations not currently using a CDP



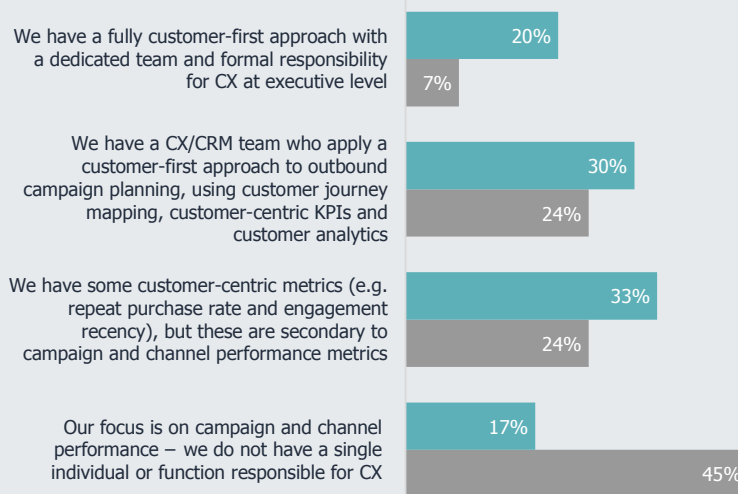
Transactional businesses, including all companies classified as retail in its broadest sense, are more than twice as likely to have fully synchronized online and offline customer journeys (38% vs. 18%).

**Transactional vs. non-transactional**

As part of the analysis for this research, we also compared the data for transactional versus non-transactional businesses (Figure 9). By 'transactional', we mean companies that allow customers to buy from them directly, in either an online or offline retail environment. Transactional companies most obviously include direct-to-consumer retail companies and exclude companies operating with a B2B2C model.

Figure 9 shows that transactional companies are almost three times as likely as their non-transactional counterparts to have a fully customer-first approach (20% vs. 7%), with a dedicated team and executive-level responsibility for CX.

**FIGURE 9**  
Who is responsible for the customer experience in your organization? (Transactional vs. non-transactional businesses.)



Transactional companies are almost three times as likely to have a fully customer-first approach, with a dedicated team and executive-level responsibility.

- Transactional businesses
- Non-transactional businesses

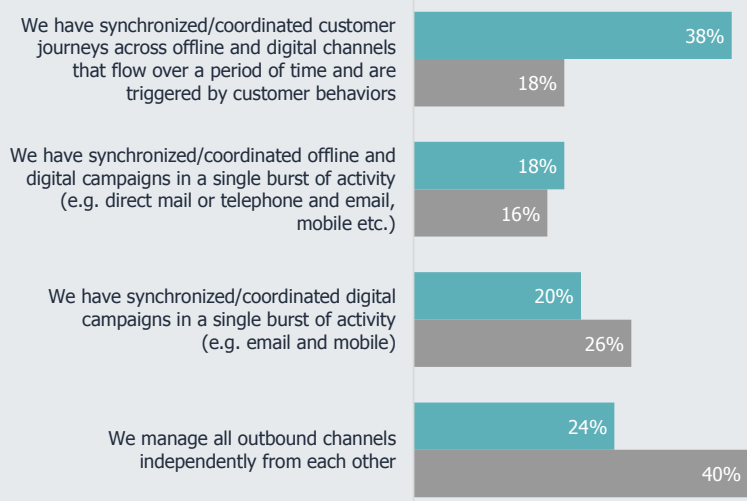


Non-transactional businesses are much more likely to be siloed, treating their outbound channels independently from one another (40% vs. 24%).

The difference between these two types of business is also particularly stark when it comes to their approach to outbound customer communications (Figure 10). Transactional businesses, including all companies classified as retail in its broadest sense, are more than twice as likely to have fully synchronized online and offline customer journeys (38% vs. 18%), reflecting the need for transactional businesses to drive sales through coordinated customer communications.

Non-transactional businesses are much more likely to be siloed, treating their outbound channels independently from one another (40% vs. 24%). Analysis based on company size found only relatively small differences between medium-sized (\$50m-\$1bn in annual revenues) and large (\$1bn plus) enterprise companies in terms of how they coordinate their cross-channel communications (Appendix 2, Figure 31). This is a function of the falling cost of technology and the maturing of cross-channel planning processes that have reduced the cost and complexity of applying a more integrated approach to outbound communications.

**FIGURE 10**  
How well do you coordinate customer communications across multiple offline and digital outbound channels? (Transactional vs. non-transactional businesses.)



*Transactional businesses are more than twice as likely to have fully synchronized customer journeys across offline and digital channels.*

- Transactional businesses
- Non-transactional businesses

## 3

# Inbound marketing

Inbound marketing is the second key pillar of our omnichannel maturity model. While outbound relates to more external pushing of brand communications, inbound is more about pulling in prospective customers through content marketing and SEO, in conjunction with paid advertising, awareness channels and social media marketing.

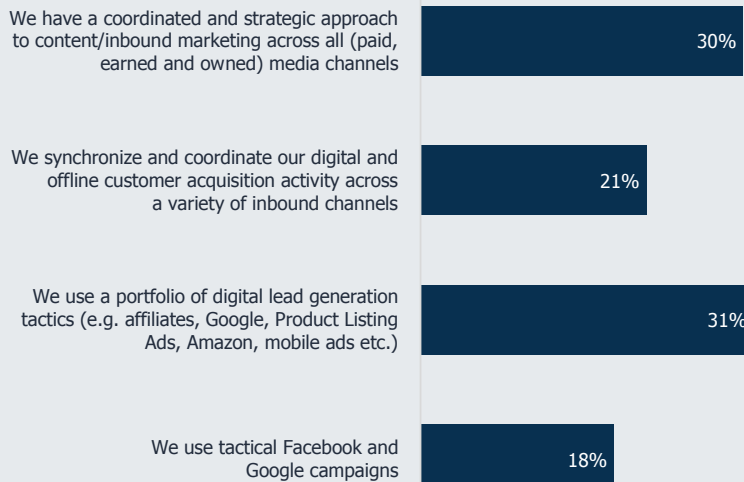
For effective inbound marketing, brands need to make sure they are as helpful and accessible as possible in the early stages of the customer journey, so that they can engage and nurture leads, and eventually turn them into customers. As with other elements of omnichannel marketing, a coordinated approach across all relevant channels is required, both online and in traditional avenues, whether in-store or through a call center.

Orchestrating online and offline activities is problematic for many organizations, with customer engagement data for online and offline residing in different platforms, rendering a unified approach impossible. A retail brand, for example, should know when to stop advertising a product online to an individual who has already made the purchase in a brick-and-mortar store.

While almost a third (30%) of companies say they can integrate their paid, owned and earned digital channels in a strategic fashion, only around a fifth (21%) of those surveyed say they synchronize and coordinate both digital and offline activity across a variety of inbound channels in the context of customer acquisition.

Effective inbound marketing is an attractive area of investment for businesses because it can result in reduced media spend, especially when brands are using first-party data effectively as part of their display advertising and paid social campaigns.

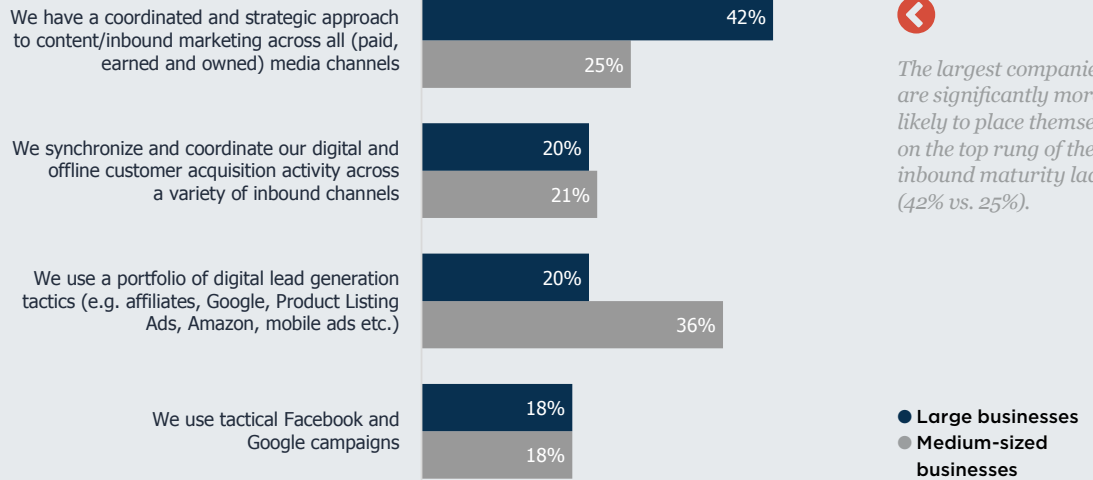
**FIGURE 11**  
How do you attract inbound leads to your website/ecommerce store?  
(All respondents.)



*Only around a fifth (21%) of those surveyed say they synchronize and coordinate both digital and offline customer acquisition activity.*



**FIGURE 12**  
How do you attract inbound leads to your website/ecommerce store? (Large vs. medium-sized businesses.)



### Enterprise businesses are playing a more strategic game

It is worth noting that the largest enterprise companies are in a better position than their medium-sized counterparts to play a more strategic game across all of their inbound marketing channels.

Figure 12 shows that the largest companies are significantly more likely to place themselves on the top rung of the inbound maturity ladder (42% vs. 25%). Medium-sized businesses are much more likely to say that they take a more tactical approach, using a disparate portfolio of tools such as affiliate marketing, Product Listing Ads and Amazon (36% vs. 20%).

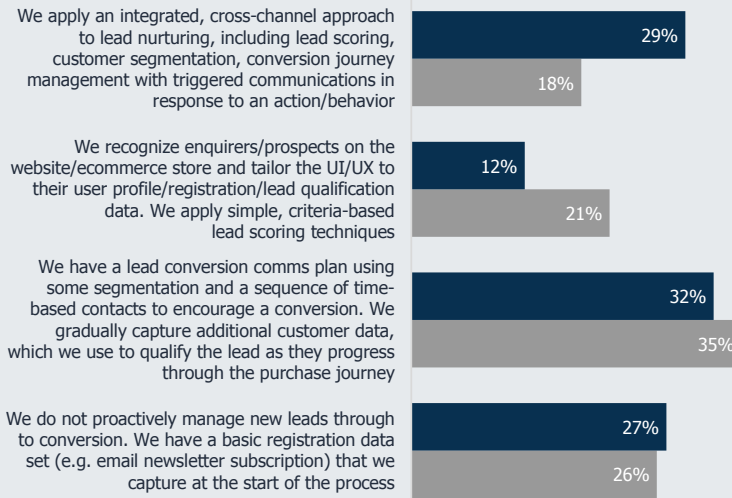
Respondents at the largest businesses are also at a higher stage of maturity when it comes to lead nurturing and conversion rate optimization sophistication (Figure 13).

Between a quarter and a third of large enterprises (29%) say they take a cross-channel approach to nurturing leads, with tactics including lead scoring, customer segmentation and conversion journey management with triggered communications in response to an action or behavior. Less than a fifth (18%) of medium-sized businesses say that they do this, with these organizations correspondingly being more likely than their larger counterparts to use simpler, criteria-based lead scoring techniques (21% vs. 12% of the largest companies).

The gap between the capabilities of larger and medium-sized companies is more pronounced than that for outbound marketing techniques because, in simple terms, outbound marketing is easier to do and more accessible to smaller brands. Advanced inbound marketing typically relies on greater volumes of data and content, real-time decisioning and more carefully coordinated communications in response to consumer behavior and preferences. It is unsurprising, therefore, that the big brands take a lead over their smaller rivals.

That said, as digital media matures, best practice emerges and marketers upskill in terms of technical capability, the barriers to entry into advanced inbound marketing are likely to fall. Better access to a single customer view (SCV) will help to speed up this process. An SCV has traditionally been out of reach for smaller companies, due to the expense involved in launching a large services project. Customer data platforms, being more affordable and accessible than such projects, have helped to democratize this process.

**FIGURE 13**  
How do you maximize conversion to purchase for new visitors to your website/ecommerce store? (Large vs. medium-sized businesses.)



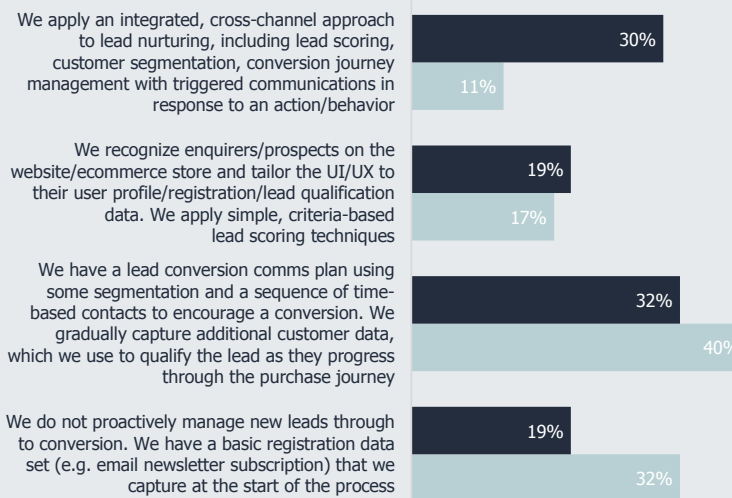
29% of large enterprises say they take a cross-channel approach to nurturing leads, with tactics including lead scoring, customer segmentation and conversion journey management with triggered communications.

- Large businesses
- Medium-sized businesses

The impact that CDPs have on inbound marketing and effective lead nurturing is evident from *Figure 14*. Companies with CDPs are nearly three times as likely to be adopting the most advanced practices (30% vs. 11%), whereas the vast majority of companies without CDPs (72%) cannot get beyond basic segmentation and lead nurturing. This reflects the central role that customer data management plays in delivering personalized experiences across multiple inbound channels in real-time.

The ongoing importance of SEO in the context of inbound marketing also needs to be acknowledged. Our survey found that only 23% of companies surveyed classify themselves as advanced in terms of this discipline, defined as having dedicated SEO resource/expertise working to a strategic SEO roadmap and content strategy, driven by organic search data, while also understanding and managing the overlap with paid media (see *Appendix 2, Figure 32*).

**FIGURE 14**  
How do you maximize conversion to purchase for new visitors to your website/ecommerce store? (CDP vs. non-CDP users.)



Companies with CDPs are nearly three times as likely to be adopting an integrated, cross-channel approach to lead nurturing.

- Organizations using a CDP
- Organizations not currently using a CDP

## 4

## Owned media

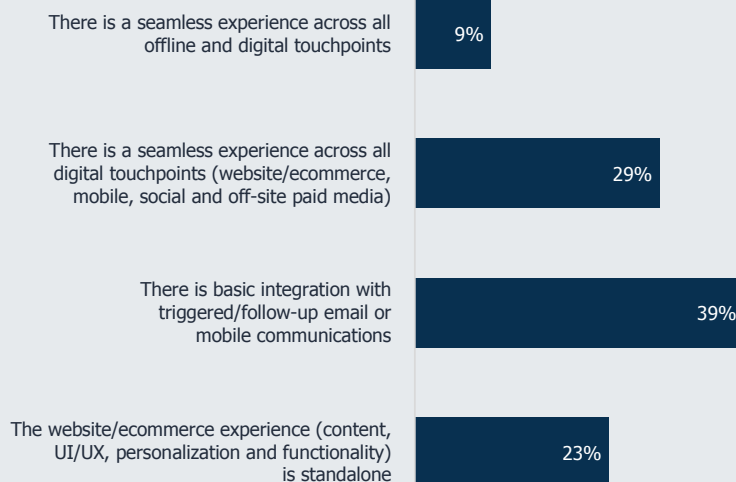
Owned media is the third pillar of our omnichannel marketing maturity model. A brand's owned digital properties (principally its website, ecommerce store and mobile app) are crucial elements within the customer journey, from consideration before the sale to advocacy afterwards. That makes them an integral part of any true omnichannel business.

What's striking from the research is how few organizations have achieved this complete integration (*Figure 15*). Only 9% of respondents said that they are delivering a seamless experience across all offline and digital touchpoints – the Holy Grail of marketing excellence. Beyond that, only another 29% have managed to join up all the digital elements of their customer journey.

The central nature of a brand's owned properties doesn't always mean the marketing department has complete control over them. IT may be responsible for managing the website, possibly because of the type of content management system the business is using, or because it still has an old-fashioned approach to digital management. Equally, the webstore might well be run by a separate ecommerce team.

In addition, while marketing communications can operate with a short lag, owned web properties need to respond in close to real-time. Almost half of consumers (47%) expect a web page to load in two seconds or less, and the same percentage of mobile users expect websites to load in less than two seconds<sup>4</sup> on their phone.

**FIGURE 15**  
To what extent is the website/ecommerce experience 'joined-up' with other visitor/customer interactions?  
(All respondents.)



*Only 9% of respondents report seamless experiences across all offline and digital touchpoints.*



Fewer than a fifth of companies are personalizing their owned properties based on all offline and online variables, such as purchase/order history, surveys/preferences, service interactions and operational data such as inventory levels or delivery lead times.

**Personalization and real-time interaction**

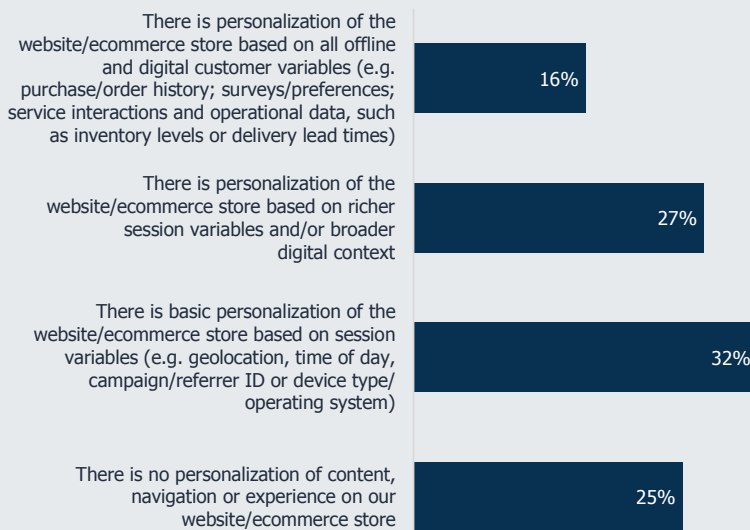
Websites and ecommerce stores were among the early targets for personalization, and on-site personalization is now available within content management systems either as a native component or as a plug-in. These personalization engines – referred to by Forrester<sup>5</sup> as Real-Time Interaction Management tools – support the real-time decision making that enables digital optimizations. They can also be used to manage interactions across customer touchpoints, like call centers, chat functions and in-store service desks.

Despite this, more than half of respondents (57%) are still either using basic personalization, or none at all (Figure 16). At the other more sophisticated

end of the scale, fewer than a fifth (16%) are personalizing their owned properties based on all offline and online variables, such as purchase/order history, surveys/preferences, service interactions and operational data such as inventory levels or delivery lead times.

At the rung below this, 27% of companies are able to personalize the website/ecommerce store based on richer session variables and/or broader digital context, and it is likely that these companies are benefiting from commoditized on-site personalization tools. Using browsing/clickstream data is the start of the personalization journey, but using offline behavior to personalize the online experience is the real challenge and next step of personalization maturity.

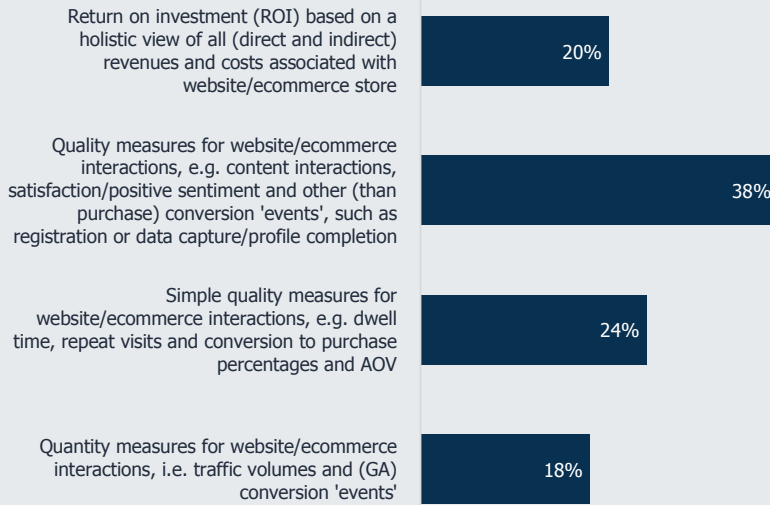
**FIGURE 16**  
How personalized is the website/ecommerce store experience for your visitors/customers? (All respondents.)



Only 16% of companies surveyed are personalizing their owned digital properties based on all offline and online variables, such as purchase/order history, surveys/preferences, service interactions and operational data.

<sup>5</sup> Rusty Warner; Forrester; Now Tech: Real-Time Interaction Management, Q2 2020; April 30, 2020.

**FIGURE 17**  
What are the key performance metrics for your website/e-commerce store? (All respondents.)



Over half (58%) of companies are employing engagement metrics that reflect the type and quality of user interactions, including 20% that measure ROI based on a holistic view of revenues and costs.

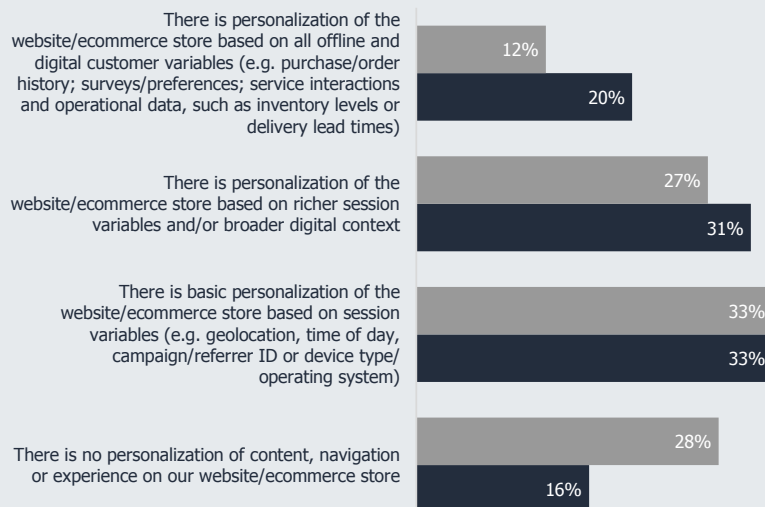
Respondents are noticeably more mature in their approach to performance measurement. The vast majority (82%) are using tracking and measurement techniques that go beyond basic traffic/page view volumes, with over half (58%) employing engagement metrics that reflect the type and quality of user interactions (Figure 17).

Large companies (defined in this context as those with more than 1 million customers) are slightly more advanced than smaller ones in all aspects of owned media optimization (Figure 18). They are more likely to be personalizing their owned media properties based on all online and offline variables (20% compared to 12%), while smaller businesses are almost twice as likely not to be doing any

personalization of their website or e-commerce store (28% compared to 16%).

Strikingly though, the numbers doing basic personalization, or personalization based on richer session variables, are very similar. This suggests that, with the right customer journey design supported by data and technology strategies, smaller brands can compete in this area with larger ones.

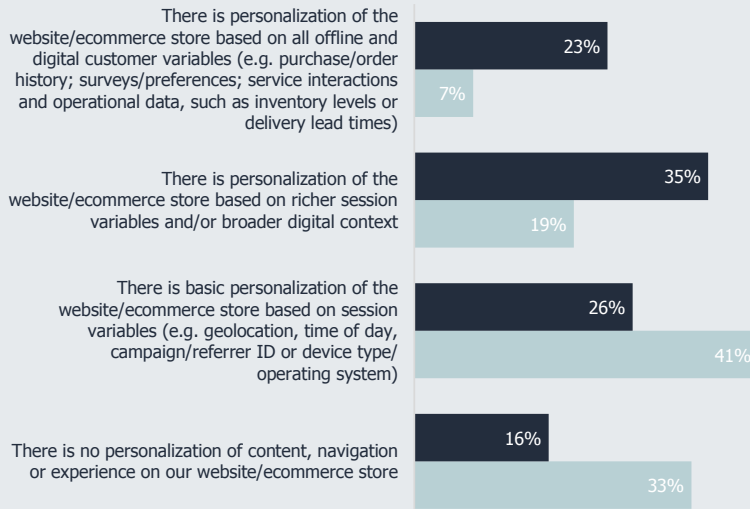
**FIGURE 18**  
How personalized is the website/e-commerce store experience for your visitors/customers? (By number of customers.)



Companies with more than 1 million customers are more advanced than smaller ones in all aspects of owned media optimization.

● Less than 1m customers  
● More than 1m customers

**FIGURE 19**  
How personalized is the website/ecommerce store experience for your visitors/customers? (CDP vs. non-CDP users.)



Organizations using a CDP are significantly more likely to be delivering advanced personalization to enhance the customer experience.

- Organizations using a CDP
- Organizations not currently using a CDP

Research by the CDP Institute indicates that personalization is regarded as a key benefit of CDPs<sup>6</sup>. The decisions behind such personalization can only be as good as the data they are based on, so the advanced data management capabilities of a CDP form a solid basis for personalization maturity. This fact is reflected in the research data, which shows that organizations using a CDP are more likely to be delivering advanced personalization to enhance the customer experience than those that aren't (23% vs. 7%, *Figure 19*).

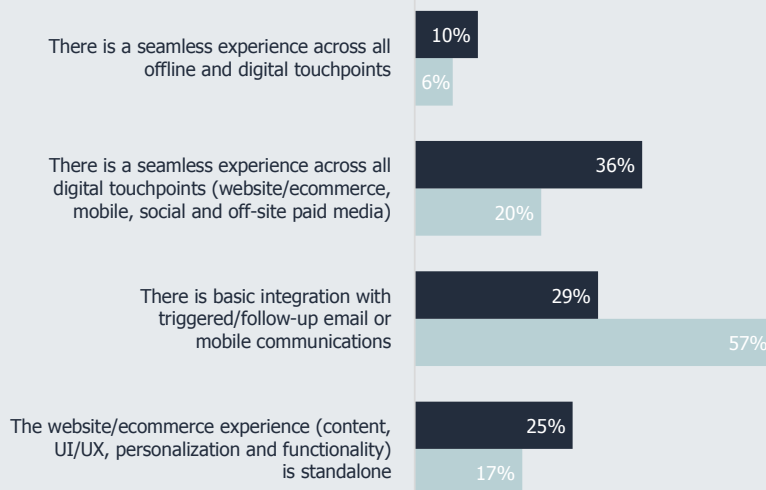
Personalization engines help to support real-time decisioning, enabling digital optimization, including AB testing, content and campaign optimization, enhanced commerce experiences and predictive product/content recommendations. These engines can also be used for interactions across customer

touchpoints, such as call centers, chat functions and in-store service desks.

A CDP is also a powerful tool to bring together data from across the organization. It can break down silos and help to create the single customer view that forms the basis for seamless customer experiences. The research (*Figure 20*) shows that CDP users are almost twice as likely as non-users to be offering such an experience (10% vs. 6%), and to have joined up all their digital touchpoints (36% vs. 20%).

The surprise here is that a quarter (25%) of companies with CDPs are managing their web or ecommerce experiences in isolation. The most likely explanation is that these will be some of the 40% of CDP users that only operate online (see *Appendix 2, Figure 33*).

**FIGURE 20**  
To what extent is the website/ecommerce experience 'joined-up' with other visitor/customer interactions? (CDP vs. non-CDP users.)



CDP users are almost twice as likely as non-users to be offering a seamless experience across all offline and digital touchpoints, and to have joined up all their digital touchpoints.

- Organizations using a CDP
- Organizations not currently using a CDP

## 5

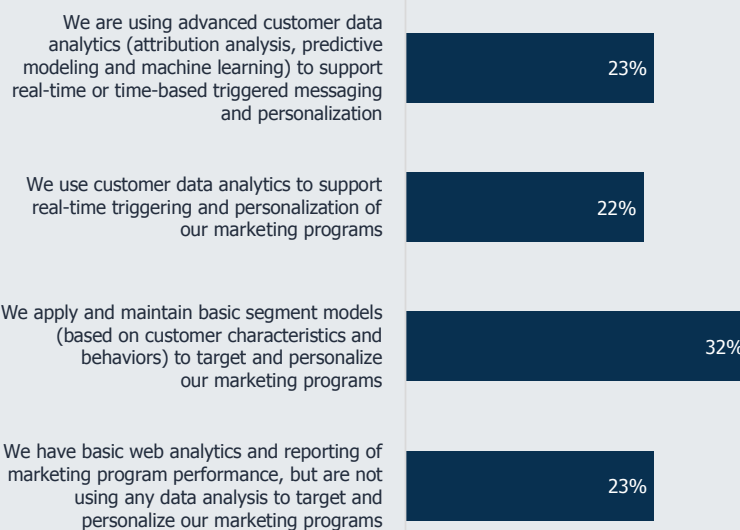
# Cross-channel orchestration

Cross-channel orchestration is the fourth and final pillar required to support omnichannel marketing excellence. The ability to deliver seamless cross-channel experiences is the ultimate goal for marketers. How capable they are of achieving this will depend on how well companies understand their customers and how effectively they can translate these insights into value-adding brand interactions.

Brands need to bring together outbound, inbound and owned media in a seamless customer experience across all channels and devices, both online and offline. Doing this requires companies to develop a single customer view (SCV), then use it to develop insights into the customers' needs and behaviors, and to translate those insights into brand interactions that add value for both the customer and the business.

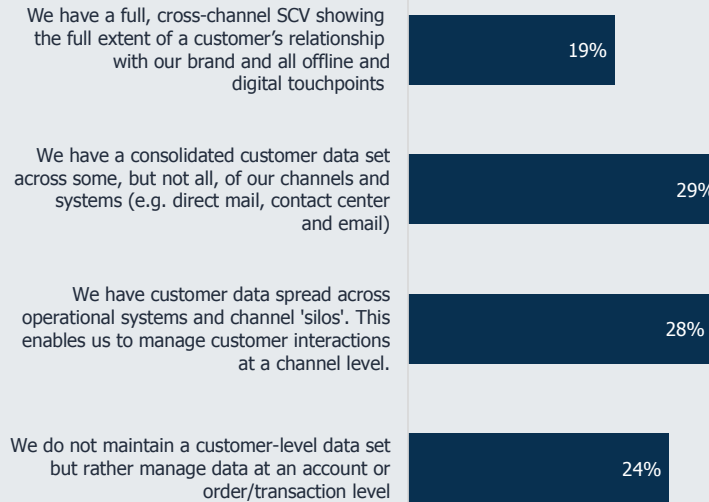
In an age when effective use of customer data and insights can be a source of significant competitive advantage, advanced analytics are very much contingent on a cross-channel SCV. A similar proportion of respondents said they were using advanced data analytics (23%, *Figure 21*) as said they had an SCV across all channels and touchpoints (19%, *Figure 22*).

**FIGURE 21**  
To what extent are you leveraging data analytics to target and personalize your marketing programs? (All respondents.)



Almost a quarter (23%) of respondents said they were using advanced customer data analytics.

**FIGURE 22**  
Do you have a robust, accurate and actionable single customer view (SCV) on which to base customer communications? (All respondents.)

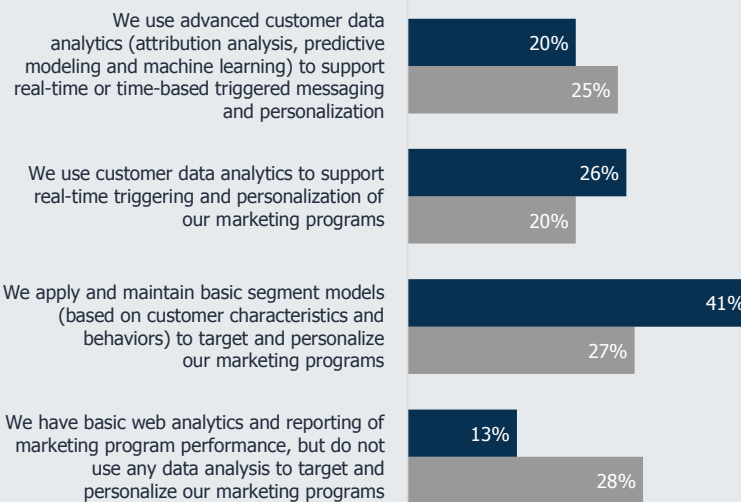


Around a fifth (19%) of companies report that they have a full, cross-channel SCV.

**Analytics maturity**

As can be seen in *Figure 23*, the proportion of medium-sized enterprises operating at the two highest levels of analytics maturity is very similar to that of large ones (45% vs. 46%). This shows that the financial and technological barriers to adopting advanced analytics have fallen. However, at the bottom end of the analytics maturity scale, over twice as many medium businesses as large ones are still using basic web analytics and reporting (28% vs. 13%). This will be a key area of investment for these businesses as they look to transform their marketing programs and adopt an omnichannel approach, incorporating all of their outbound, inbound and owned media communications.

**FIGURE 23**  
To what extent are you leveraging data analytics to target and personalize your marketing programs? (Large vs. medium-sized businesses.)

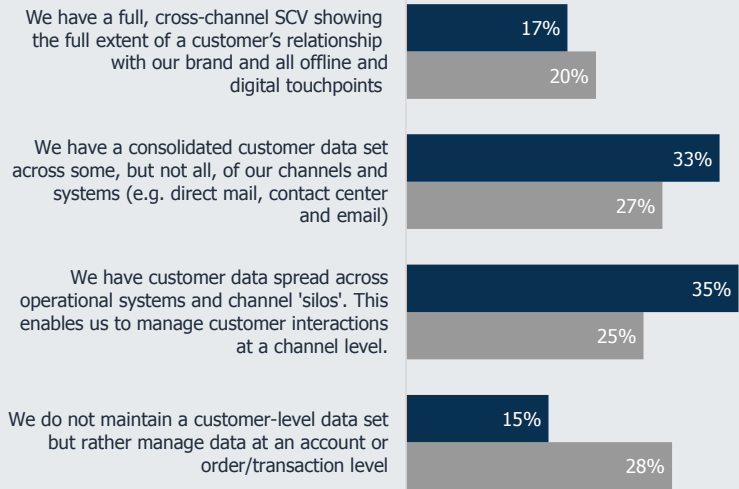


Medium-sized businesses are more than twice as likely as larger ones to be using only basic web analytics and marketing performance reporting.

● Large businesses  
● Medium-sized businesses



**FIGURE 24**  
Do you have a robust, accurate and actionable single customer view (SCV) on which to base customer communications? (Large vs. medium-sized businesses.)



Almost equal numbers of large and medium-sized businesses operate at the top two levels of SCV maturity (50% vs. 47%).

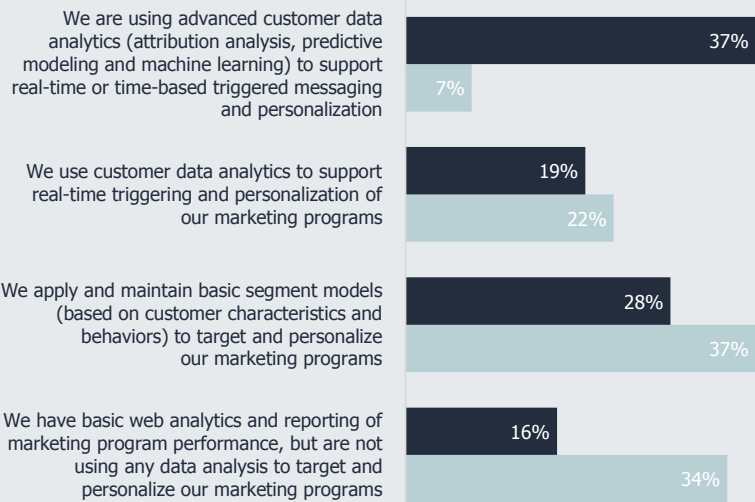
● Large businesses  
● Medium-sized businesses

A similar pattern of maturity is also seen in how widely an SCV has been achieved in large and medium-sized businesses (Figure 24). Again, almost equal numbers of each are operating at the top two levels of SCV maturity (50% vs. 47%). What is striking is that the largest organizations are significantly more likely to be struggling with data silos than their smaller peers. This demonstrates the challenges that scale presents in terms of data volume, complexity and variety, as well as of organizational structure. Many large businesses will have multiple brands and will operate across a number of territories, making data management vastly more difficult.

The research also demonstrated the importance of having robust, high-quality data management to underpin your analytics, and therefore your delivery of personalized experiences at scale.

It is impossible to move to the new cutting-edge marketing techniques – which include ‘next-best-action’ (NBA), machine learning, AI and predictive modeling – without the data assembly and management offered by a CDP. The research found that CDP users are five times more likely than non-users (Figure 25) to be leveraging these techniques to deliver and optimize their customer experience (37% vs. 7%). At the other end of the scale, organizations without a CDP were significantly more likely to be restricted to using basic segmentation (37% vs. 28%) or to be doing no personalization at all (34% vs. 16%).

**FIGURE 25**  
To what extent are you leveraging data analytics to target and personalize your marketing programs? (CDP vs. non-CDP users.)



CDP users are five times more likely than non-users to be leveraging advanced customer data analytics to deliver and optimize their customer experience (37% vs. 7%).

● Organizations using a CDP  
● Organizations not currently using a CDP

## Recommendations

The aim of this research is to help marketers validate and refine their current activity, so that they can define a roadmap to help them move up the omnichannel marketing maturity scale. The exact nature of this roadmap will vary, depending on a company's current capabilities and target end state. The detailed plan will be specific to your business's needs, opportunities, objectives and capabilities. However, there are some high-level, universally applicable pointers that emerge from the research:

**1** CDP deployment is increasingly correlated with enhanced business performance. Marketers must own and drive the strategic customer data agenda and, specifically, they must quantify the business case for investment in marketing technology. Marketers must model the 'return on investment from customer data' with the same rigor and focus that they track and optimize the ROI of their campaigns, content assets and promotions.

**2** Making the case for, and fully exploiting the potential of, a high-powered marketing technology stack requires a hands-on executive sponsor. This customer champion can provide a focal point for the enterprise-wide digital transformation program that is required to deliver seamless cross-channel experiences, to drive differentiation, advocacy and competitive advantage.

**3** Marketing has become a real-time, always-on discipline and purchase journeys are now anything but linear or predictable. Marketers now need to use planning methods and techniques. Customer journey mapping has emerged as a key tool to:

- analyze consumer needs - understand consumers, model their reality (what they are thinking, feeling and doing) and codify/calibrate the key 'events' in their purchase decision journey.
- design better experiences - work out where, when and how a brand can turn up to serve the consumer better.

CDPs, journey orchestration and personalization technologies enable brands to 'be there, be quick and be useful'. But ultimately, these software components are only as good as the business/comms/campaign brief they are given to address. Marketers must be more ambitious, creative and specific in defining what they want (e.g. cross-channel customer journeys), so that the technology, media and content specialists can work out how best to execute this.

**4** The old adage 'if you can't measure it, you can't manage it' still holds true. The beauty of customer journey mapping is that it helps model and codify the key events (and data points) in a purchase journey - the 'moments' that matter most. This helps with experience design and campaign, content and media planning. It also helps you define and track the various KPIs and metrics that will support measurement and optimization.

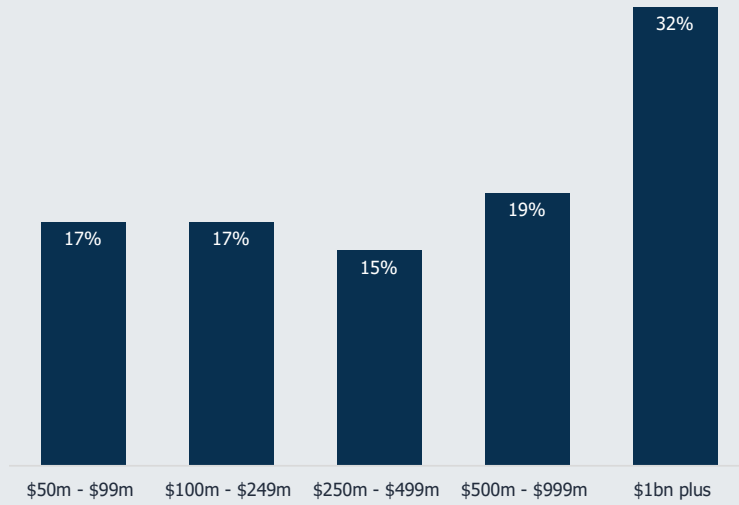
**5** Deep, actionable customer insights are now the only defensible source of competitive advantage. Competitors can copy your products, promotions, pricing and routes to market, but they cannot replicate your knowledge of your customers' characteristics, purchases and (current and likely future) behaviors. This is your secret weapon. The ability to translate these insights into enhanced experiences (like a targeted discount, a product recommendation, a personalized in-store greeting or a post-purchase service call) is the new marketing battleground. Analytics is now a core marketing discipline that will underpin sustainable brand growth and differentiation. Resource-up and manage your analytics function to act as a center of excellence at the heart of your marketing operations.

**6** Analytics is only as good as the data on which it is based, so customer data management has joined analytics as a core marketing competence. Marketers must frame and lead the data strategy and work out how their company can move up the maturity curve. Work backwards from the experiences you want to deliver and define a data strategy and roadmap that will support segmentation, personalization, testing/optimization, and the predictive modeling and reporting required to wow your customers and drive sales.

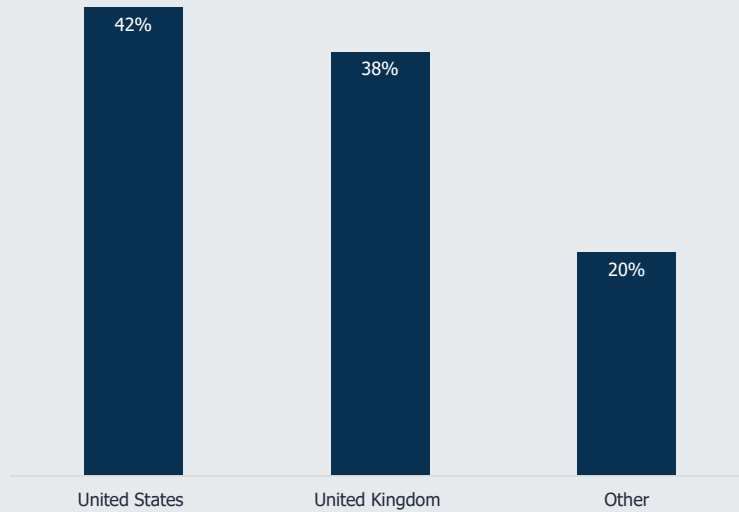
# Appendix 1

## Respondent profiles

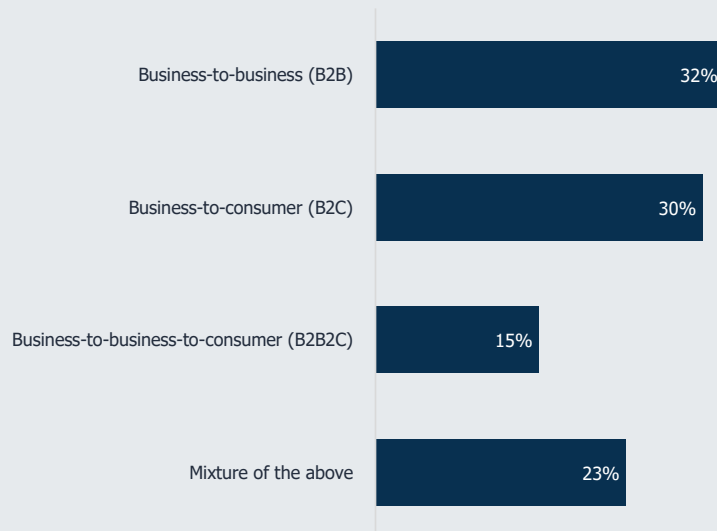
**FIGURE 26**  
What is your annual company revenue?



**FIGURE 27**  
In which country are you based?



**FIGURE 28**  
Is your organization focused mainly on B2C or B2B?

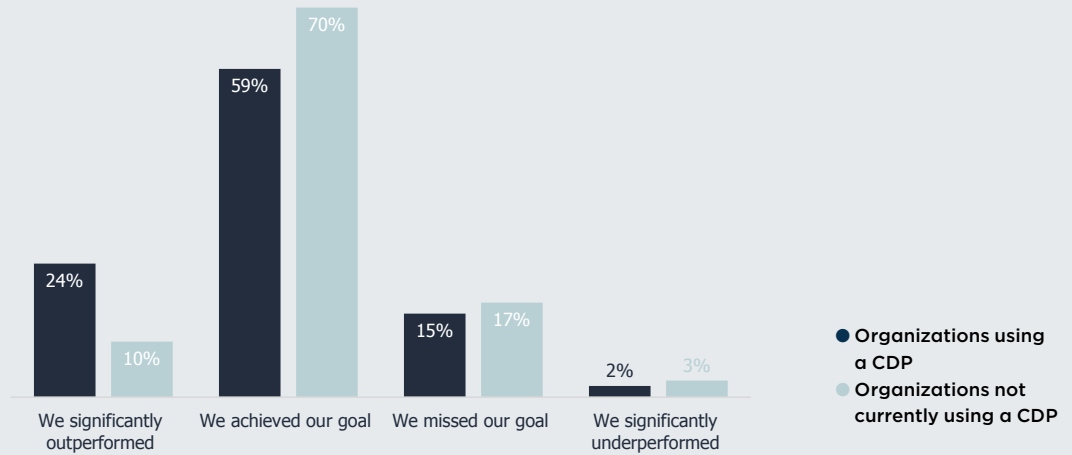


# Appendix 2

## Additional charts

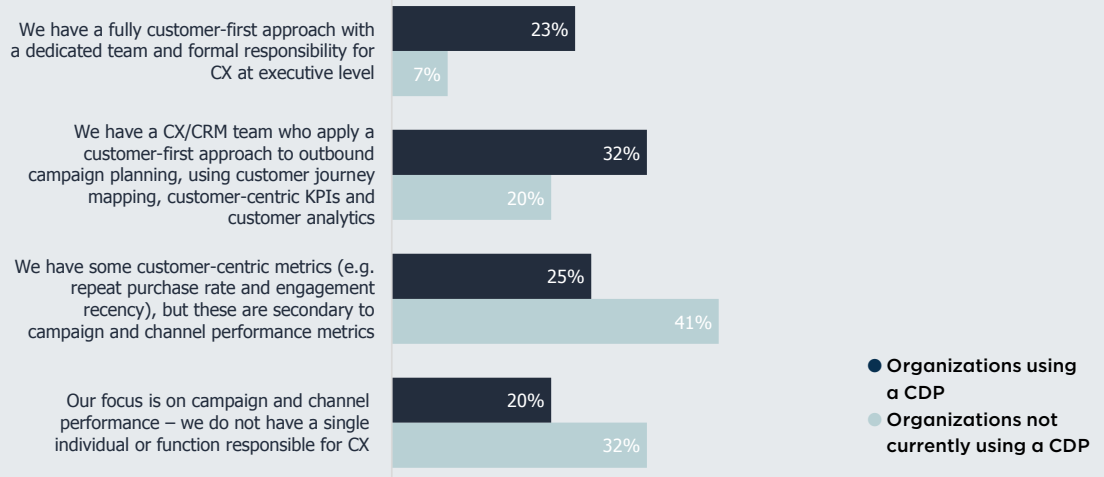
**FIGURE 29**

In respect of your organization's main marketing focus, did you achieve your main goal in 2018? (CDP vs. non-CDP users.)



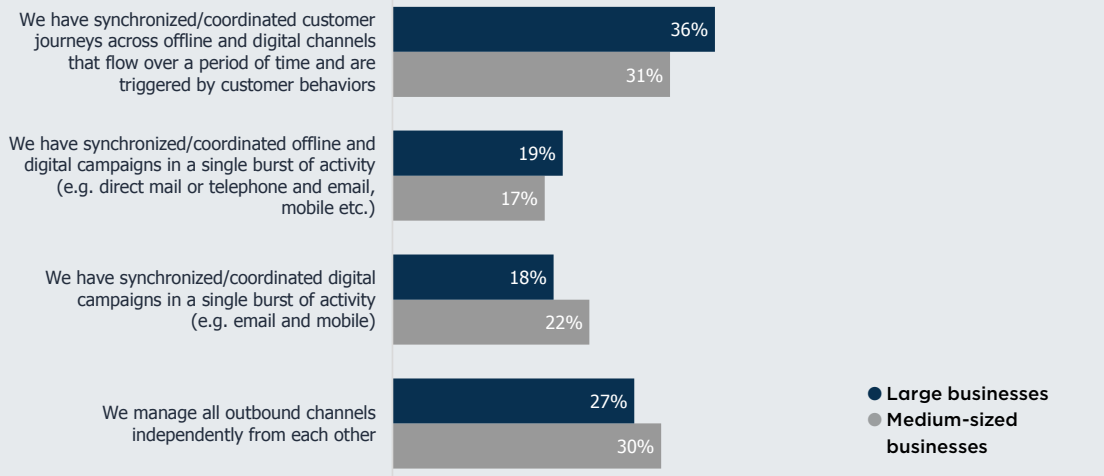
**FIGURE 30**

Who is responsible for the customer experience in your organization? (CDP vs. non-CDP users.)

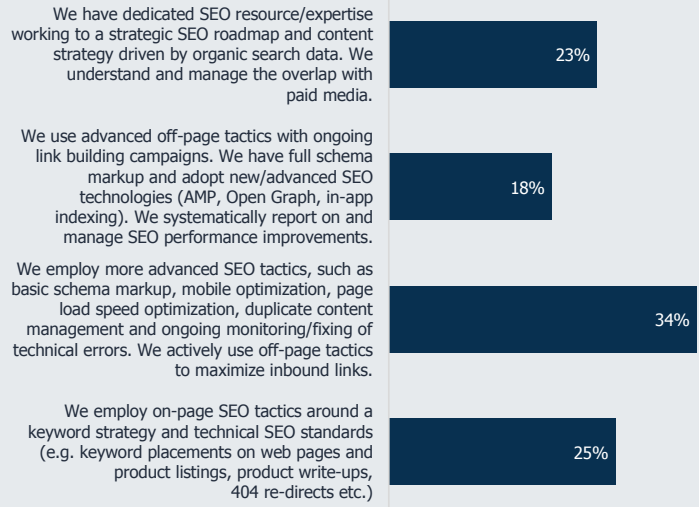


**FIGURE 31**

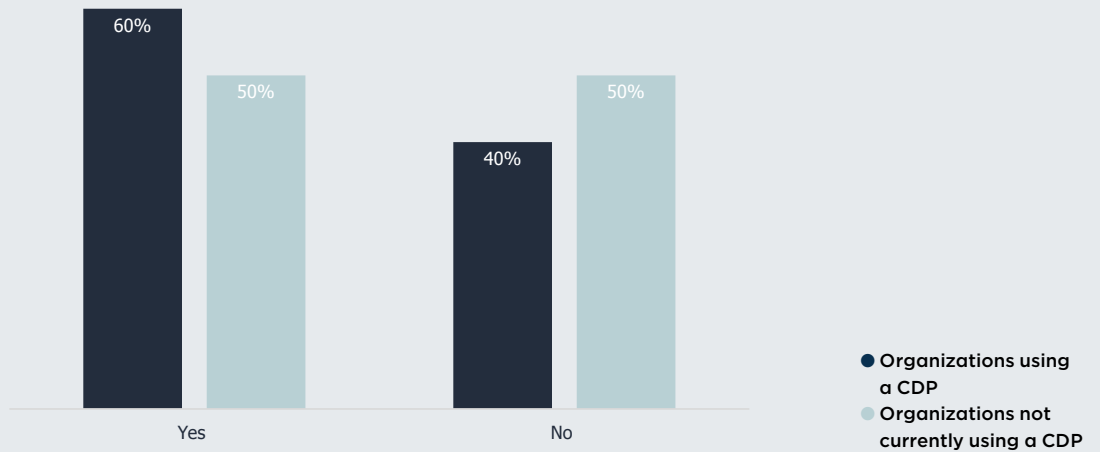
How well do you coordinate customer communications across multiple offline and digital outbound channels? (Large vs. medium-sized businesses.)



**FIGURE 32**  
How do you maximize the visibility of your website/ecommerce store to boost organic search traffic?  
(All respondents.)



**FIGURE 33**  
Does your organization have physical stores, branches or premises for your customers to buy from you?  
(CDP vs. non-CDP users.)



# Get in touch



Please get in touch with BlueVenn if you would like to learn more about its customer data platform offering:

➤ [marketing@bluevenn.com](mailto:marketing@bluevenn.com)

**LONDON  
RESEARCH**

If you are interested in producing high-quality B2B research, please contact London Research.

➤ [info@londonresearch.com](mailto:info@londonresearch.com)