ARCHITECTING
CONNECTED
DIGITAL
EXPERIENCES
Using New
Marketing
Technologies

A playbook for brands to de-silo the customer’s journey and build a unified view of audiences.

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THE CONTENT ADVISORY
INTRODUCTION
ENGAGING AUDIENCES.
CREATING FANS.

Good customer experiences satisfy a known desire. Exceptional customer experiences both satisfy and inspire all new desires.

Marketing’s goalposts have moved. Again.

As digital marketing was just beginning to emerge 25 years ago, author and Harvard Business School professor James Heskett published what he and his colleagues called the “Service Profit Chain.” In it, he detailed how simple satisfaction in customer service was no longer sufficient. The new goal would be to create advocates. Heskett discussed how Scott Cook, then CEO of Intuit, desired to create what he called customer “apostles.” These were customers who were “so satisfied (with the product/service) that they convert the uninitiated.” (See Figure 1.)

One of the key “links” in the Service Profit Chain is frontline workers’ role in using tools that enable better communication among the internal teams. Customer satisfaction is heavily influenced by the value of person-to-person experiences. That value is created when employees are happy and productive. And happy and productive employees have access to connected support services and tools that enable them to communicate with each other and ultimately deliver these positive experiences.

In 2020, businesses must evolve again. The challenge to create these apostles now begins far earlier in the customer’s journey. Engaging and inspiring satisfied audiences through digital experiences now begins from the first time a prospective customer encounters content and is a critical goal throughout the marketing and sales process.
In the current digital-dominant world, frontline workers continue to play a crucial role in customer satisfaction. Today’s content-driven digital experiences are also managed and fed by both controlled and uncontrolled content from the likes of influencers, executives, marketing, sales, customer service managers, and even other customers.

So, the myriad of digital content experiences created by the business are inexorably connected, and directly reflect (well or poorly) on the business’s ability to create cohesive, integrated value.

Borrowing from the “apostles” idea, today’s modern digital marketing experiences must go beyond the simple satisfaction of a desired outcome. They must both satisfy the desired outcome and create still more desire. The goal is to not only deliver satisfactory value at each experience, but to create a desire to take an action.

Marketers must now inspire audiences to be so actively engaged that they want to experience and share more from that brand. Put simply: the “apostles” become “fans.” (See Figure 2.)
At the heart of this new business challenge is not just an individual marketer, salesperson, or even a team creating single, stand-out experiences. Meeting the challenge of creating fans through the marketing and sales journey must be done at the brand level. It needs to be a core organizational capability.

Today, many marketing organizations seem stuck in a never-ending cycle of chasing the technological needs of internal content/experience silos and then trying to enable them with content and approaches that optimize each separate layer of the customer’s journey. In TCA’s work and research over the last decade, it has been common to see multiple technology solutions managing data, activating content, and measuring consumption of siloed experiences at disparate parts of the journey. One recent study found that half of all marketers named “too much technology” as their top frustration, followed closely by “integrating the technologies” (49%).

As one of our clients, the head of creative marketing of an enterprise financial services company, said to us:

“Why should I have to hire a full-time technology vendor wrangler? Isn’t it possible to find one partner who can simply facilitate better communication technology with our prospective clients? Can’t we have a single source of the truth for our audiences? We currently have more than 40 technologies working the top and middle of the buyer’s journey. That’s at least 30 too many.”

These findings are backed up by TCA’s and CMI’s research in Content Management and Strategy. In our 2020 research, we discovered that 73% of marketers still say they either have not acquired the right technology for customer experience or are not making optimal use of the technology they have.

Put simply, the challenge of connecting digital customer experiences is not a shortage of technology. In fact, in many cases there are too many technologies. The overarching challenge is that most organizations approach the technology of digital marketing as siloed engines that power separate, channel-specific experiences rather than a self-learning, connected network that can optimize the customer’s journey and provide a unified view of the customer.
DE-SILO
THE DESIGNED JOURNEY, NOT THE ORGANIZATION

From our work with companies all over the world, we have seen that it is extraordinarily hard to begin organizing the management of digital experiences by first de-siloing the organization. This is complicated further by then trying to get agreement on a collaborative technology solution stack that provides each silo everything they believe they need.

Rather, it is easier (but certainly not easy) to do the reverse. Our recommended approach is to begin with a marketing technology team that looks to architect the various pieces of the sales and marketing process – the entirety of what we call the “designed customer’s experience” (DCE). Then, align, agree upon, and note gaps for technology solutions that can support this DCE. Finally, with a specific charter, work to commission, decommission, or improve the various content-driven experiences by connecting them one by one. These initiatives to connect the desired customer’s experience into a network of touchpoints should be chartered at the highest level of the organization, but then assigned with a small-scale, achievable scope.

Success there will enable the next initiative, and the next, until the entire journey is connected.

This playbook can help set the stage. It outlines our approach for modern businesses to begin to architect and design the right set of technologies to deliver a connected and automated network of content-driven, digital experiences. It’s the foundation of answering what should be, as well as identifying which tools you need to be able to deliver it.

This playbook identifies five discrete sequential steps to follow to develop your DCE. (See Figure 3.)

Figure 3
Five Steps to DCE

Audit
Review and grade the organizational capability to deliver the optimal customer’s experience against four foundational challenges.

Architect
Architect an optimized stack, with data at the foundation, Assemble the best categories of solutions for each layer of the stack.

Layer
Prioritize specific automation and trigger solutions/ layers based on the audit and the most pressing of the experience challenges.

Map
Create a high-level map of the designed network of digital experiences, highlighting flow and behavioral rules.

Initiate
Create a charter for a small-scale and achievable scope for the first initiative, and detail the needs to connect the experiences.
Let’s explore each one in turn.

**STEP ONE: AUDIT AND ASSESS AN EXISTING DIGITAL JOURNEY**

There are, no doubt, best practices at work in most businesses. Most often, the challenge of changing how digital experiences are managed isn’t deciding what needs to improve, but what is fine as is.

Creating, activating, and measuring a designed customer experience begins by acknowledging and auditing the existing journey against the overarching challenges to be overcome. Again, these challenges do not lie in any one team or individual, but are an organizational capability. Knowing where the core challenges lie will help the business understand where gaps exist in the operating model, and where those gaps may be filled with new skills, approaches, or technology solutions.

Even if the marketing team is small, taking modest steps, or hasn’t acquired any of the technology needed, they should take the time to first understand the entire dynamic of examining at least four (there may be more) organizational technology challenges as shown in Figure 4.

1. **Addressability**: In order to deliver increasingly personalized experiences, the business must be able to uniquely identify the person. Can we reach the targeted audiences when and where they need to be reached? How early in our process is addressability important? Are we able to build and improve, progressively, the audience profile as they move from experience to experience? In the digital space, the durability and value of an “email address” currently remains the best unique identifier of addressability. But as technology evolves, and data and privacy regulations begin to take greater roles in our process, new methods of addressability and unique identification are being developed. These methods may begin to supplement or help mitigate the need for an email address in the earliest parts of the process. Can we meet this challenge at all stages of the journey?

2. **Trust**: The provenance of first-party data will be at the core of how valuable digital experiences are delivered to customers. Are we capable of ensuring that audiences can trust what our organization will do with their data and will continuously (and willingly) provide accurate input that will improve their experience and our insight? Can we track the source of all data? How will we deliver the “next best experience” to the
audience? Can we identify, and utilize, explicit data (directly provided to us), implicit data (derived from consumer behavior) and/or pseudonymous data (that which may be anonymous but implicit, or even explicit and purposely faked - but can still be used to identify a customer).

3. Collaborative Integration: No singular experience will serve as the anchor point for all audiences, yet any singular experience can be a failure point for any audience. Trust and loyalty are accumulations of value that are ultimately made up of experiences. Therefore, seamless integration of data, content, technology function, and measurement across the connection points of the desired customer experience (and thus the technologies powering them) is a critical challenge. Do we have a self-learning system that can enable the organization to move faster to improve any one experience? Do we have empowered, connected teams that can improve each experience, connect every customer no matter their entry point, and deliver continuous, organizational integration for the experiences they are creating?

4. Data Access: The governance and availability of customer, content, and consumption data will define the organizational capability to improve upon experiences. Does our organization have a single source of truth when it comes to managing not just customer data, but marketing opportunities, leads, and addressable and (as yet) un-addressable audience behavioral data? If so, what and where is it? Do we have a source for content and digital asset metadata? Can we more readily and rapidly move this information between technologies to help guide the presentation of content to audiences? As Figure 4 shows, each of these four challenges is segmented by marketing and/or sales journey stages. As the practitioner team audits and grades each capability, they can assess with some level of confidence the gaps in the designed journey.

Ultimately, marketers can view this audit across two lenses:

1. The sum of all the scores, by challenge, across the entire journey. This will help to identify the prioritized need for a category of technology.

2. The sum of scores across the challenges at each marketing and sales touchpoint. This will help the team understand which digital experiences should be addressed as a priority.

For example, a demand generation team may be creating a mountain of gated content in a resource center experience at the awareness stage. Transactions of addressable data that provide access to the content of this resource center become the “audience” for an email newsletter (managed by an email marketing tool), and leads for the sales team (managed in a sales automation tool). So, yes, the company may grade itself high on addressability by gathering identifying data. However, trust and data access are rated low because the personal data is being duplicated and flowed through email to sales team inboxes. And further, perhaps, the email marketing technology stores data in a siloed manner and is not integrated with any other part of the journey, so that receives a low rating as well. Low grades across two of the challenges may indicate that a better solution is needed.

Further, what will become clearer to the team is that a low grade at any journey stage almost certainly cascades down to the next stage and impacts its effectiveness.

As the practitioner team audits and grades each capability, they can assess with some level of confidence the gaps in the designed journey.
Once the stage assessments are complete, the team can look at the overall assessment to see which “slice(s)” they want to take on first. By following one or multiple challenges through the journey they may see that an entire category of technology is lacking. Or, they may find specific gaps in the journey where experiences are serving as “dead ends” for customers and/or data.

By reverse-engineering the entire journey, the organization can identify all the gaps, determine where priorities are, and decide where to apply new capabilities.

Then, to help prioritize new vs. existing technologies, teams can begin to architect where, and how, closing the gaps would be most useful to meet the current marketing challenges.

**STEP TWO: ARCHITECT THE DATA FOUNDATION**

As marketing technology has stratified over as many digital experiences, so has the data itself.

- Ad-oriented technologies can now capture unique visitor identification so as to better target ads.
- Digital marketing platforms capture email addresses and content consumption on websites.
- Customer data platforms capture audience data as well as behavioral and transactional data for personalization purposes.
- CRM systems capture customer transactions.

The result of this multitude of technology is that data across the entire journey gets siloed and/or duplicated in many different systems.

This means that marketers don’t understand where any one customer is on her particular journey. And while integration between these systems is theoretically possible, few businesses actually invest the effort or time to network these solutions together.

Successful companies are architecting a layered approach to technology that has a foundation of data – a singular “source of the truth.” These organizations typically scale and provide consistent experiences across a number of departmental silos. Some do this with one provider offering a suite of solutions at each level, while others use multiple vendors integrated together.

The key is that this experience technology stack approach is designed as a layered architecture around a connected network of experiences with purposeful data collection and storage.

Data is the foundation, as Figure 5 illustrates. The storage of consumer, content, and transactional data will become the method to drive more personalized, targeted, and dynamic experiences. As an anchor, the stack will include as few technology solutions as possible. It will be supported by large databases/repositories and closely adhere to standards so that data can be easily extracted and used. It should enable information access as a service.

**The key is that this experience technology stack approach is designed as a layered architecture around a connected network of experiences with purposeful data collection and storage.**
As the team looks to align on the data needs, they can look across three lenses to begin the architecture.

1. **Marketing Customer Data** - The ideal here is a singular customer profile, contained in one system of record, that reflects the explicit and implicit data describing the customer and their preferences across the entire journey. This list can be overwhelming. But the marketing team should look to build this profile progressively, and only ask for or insert data into the profile as is necessary as the customer progresses from experience to experience. Therefore, the team should look to as few solutions as possible to centralize this data, expand it as necessary, and be as holistic as possible across the customer’s entire journey.

2. **Event Triggering Data** – All data is not created equal, nor should it be governed equally. Depending upon the business, the ability to track downloads, subscriptions, attendance at events, or even unstructured chats or service requests will vary greatly. But it is highly likely that this data, if it is being recorded at all, is not stored in systems that may be integrated into marketing’s system of engagement. Architecting behaviors and the designed triggers becomes an important piece of construction of the desired customer’s experience. The challenge is, of course, where to store these “rules.” Look to make a decision about which layer these rules will best be served from. This will become an important aspect of Step Three.

3. **Content Metadata** – Digital marketing content is more often unstructured content, meaning it is contained within a video, image, or PDF file, or within an interactive application. The key with tying in content and digital assets that can be reused and/or dynamically displayed through personalization is creating an organizationally common content taxonomy and metadata structure over the entire customer journey.

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**STEP THREE: LAYER AUTOMATION AND TRIGGERS**

There is no doubt that artificial intelligence (AI) and machine learning will revolutionize marketing automation, personalization, and the presentation of content-driven experiences to customers.

The effectiveness of automated content/experience delivery has always depended on how quickly marketers can “change the rules” by which the content or context of the experience is delivered. This is why AI should be located in a middle layer and embedded so that it can be the “helper” application (see Figure 6). It can connect core data to behavioral rules, and then the behavioral rules to the presentation of content.

Further, this layer can accept data from third parties, for example behavioral data, events, and other sources that can supplement internal data.

Certainly, best practices such as the creation of static digital experiences based on persona research, current success, and (yes) even the CMOs whimsical desire will persist. But as the team begins to plot how the designed customer experience can self-learn and improve, they can look to technologies that can help them automate across the speed and flexibility needed.

For example, marketers can use automation in the following areas:

- **Deliver Next Best Experiences** – Each step of the customer’s journey can lead to a next step that is linear (forward or backward) or, often, to one that is a sidestep to other experiences within the same phase of the journey. Marketing teams can look to automate this process where managing the creation and number of rules and options is overwhelming.
By integrating both available metadata and the customer's behavior, the technology can dynamically assemble rules for determining the next best experience for that customer.

- **Optimize Digital Experience Operations**
  - One of the true benefits of automation is to improve efficiency of repetitive, daily tasks. A classic challenge is when automation isn’t a binary “if/then” statement, and instead there are conditions that, when met, mean a different approach to that task is necessary. One example is routing interactions from customers as they consume experiences and have questions, send emails, or download results of recommendation engines. Machine learning can help here as the technology can ensure that routing is efficient and also populates the core data store as part of the customer’s profile.

- **Insight Detection - Patterns and Trends.**
  - As transactions begin to mount, it becomes impossible for marketers to see patterns within the huge data streams that emerge. Artificial intelligence technology can help by examining the entire corpus of data. It can enlighten and prioritize the known insights – and illuminate insights from previously unknown or undetected patterns. One common example is the creation of novel audience “personas” that begin to emerge from patterns of content consumption.
The key with mapping what will ultimately become a library of behavioral rules to the actual experiences is not looking at this as a linear journey where each experience has its own rules, but rather a network of experiences that behave in a consistent way no matter how the rules change.

Marketers can then begin to think of this architecture as a central nervous system that connects the digital content experiences like our five senses. Each digital experience sends information, and our “marketing nervous system” processes, learns, and then triggers reactions to deliver the next best communication to any of our audiences.

As the pieces come together for the foundation of how to unify the data and engine of digital experiences, the team will be tasked with mapping the existing and/or new experiences themselves. This may be an email newsletter driven by blog subscriptions, or the dynamic display of targeted content based on whether the prospect saw a particular advertisement, or the optimization of presented products in an e-commerce store.

There are, no doubt, experiences that already exist and are working to some degree. There may be others that need to
be decommissioned. Still others may need “upgrades” in order to perform as part of the newly designed customer experience. Regardless, now (as in Figure 7) the team can begin mapping these experiences along that journey and have an exact understanding of which data will be available at each particular stage, and feed the technology that can deliver it.

Being able to gather intent-data or first-party identity resolution is powerful. Marketers need a digital marketing platform that can derive intent and insights from the data it interacts with at scale with consent/transparency at its core.

Ultimately, these systems of engagement across multiple channels (mobile apps, websites, resource centers, virtual events, kiosks, etc.), can be managed as assets, almost as product-lines of marketing.

Additionally, the business will have the business of day-to-day campaign and digital asset management. For example, an infographic might be assembled from multiple approved creative image assets, but then re-purposed to also appear in a product video that resides on the website, a thought leadership blog, and the customer community. In this case, all kinds of data may need to be tracked, including usage rights by channel, but also persona targeting, journey stage, author, etc. The keys to success here will lie in the flexibility, and speed, of the tools that can access and utilize this data to provide insight into the supply chain of assets.

**STEP FIVE: INITIATE**

A key strength of starting with mapping the data and connections that span the entire journey is that this enables the final piece – starting (or improving) the front-end experiences that make up some part of the journey. The team now should have a very good idea of what data to collect, where it needs to flow from, and how it can be utilized to improve the customer experience.

More likely, however, is that at the conclusion of this analysis the team will uncover a prioritized need to re-architect the current infrastructure in order to support any new experience.

The irony is that most marketing teams get to this same place, but only after they have built siloed, disparate experiences that cannot be integrated. Hopefully, by taking the approach outlined in this playbook, teams can end the vicious cycle of first looking at what experience they want to create, and then trying to force it into the best available data collection model supported by the siloed technology.

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WELL BEGUN IS HALF DONE

The successful businesses of tomorrow will create connected networks of highly specific, interactive content experiences across paid, owned, and earned media. These businesses will measure their ability to create holistic and deepening trust with long-term audiences, rather than simply managing siloed transactions at individual steps along the buyer’s journey.

Successful businesses will create content-driven experiences focused on what customers care about based on passions, questions, needs, and wants.

And they will fuel this organizational capability by approaching their digital experience technology infrastructure to address the four challenges. They will:

- **Map their need for addressability to the desired customer experience to understand exactly where identification is required.** They will choose unique identifiers and data that help provide the 360-degree view of the customer that delivers exactly the personal information they need.

- **Have organizational capability to create connected experiences that elicit trust and accurate information from customers because they are both satisfied with the experience and desire more from the brand.** And they will provide customers with control over what data is and isn’t collected.

- **Layer an infrastructure to provide for the governance and availability of customer, content, and behavioral data.** They will connect this data access with automation and artificial intelligence that will speed the next best experience and provide faster insight into developing even better ones.

- **Integrate these technologies to create a network of designed customer experiences** that learn from each other and can be managed by dedicated teams but activated and measured as an organizational capability.

Marketers should look at the entirety of marketing as a means of building trust based on the preferences of people who make up their audience – and begin to use that affinity to develop better and more personalized experiences for those individuals, transforming them into passionate fans.

**Endnotes**


2. https://martech.zone/time-managing-data/
ABOUT
THE CONTENT ADVISORY

At The Content Advisory (TCA) we help companies devise intelligent content strategies. We help marketing leaders tell their stories better. We provide strategic consulting, education, and research to help these teams transform their business and build passionate audiences to their brand.

An audience is the most valuable asset any company will manage. For years, brands have had to rely on third-party media and measurement to reach audiences who can drive strategic business value. We know, instead, that marketers now have the disruptive power to create or acquire owned-media experiences and build these valuable audiences for themselves. The Content Advisory is committed to accelerating this shift and fundamentally transforming the practice of marketing. We are conspirators of business success.

As such, we provide:

- **CUSTOMIZED TRAINING & COACHING** programs to educate you and your teams.
- **RESEARCH & ADVISORY** based on real challenges with content marketing and customer experience.
- **STRATEGIC CONSULTING** and advisory services designed to provide relevant and actionable insights.
- **CUSTOM CONTENT** including keynotes, webinars, and session talks – thought leadership for your event.

Our focus is on the strategic use of content in the enterprise to create better customer experiences.

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