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Hyper-personalization in real time, keys to orchestrating omnichannel customer service

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1 What characteristics are necessary for an omni-channel marketing solution to have true orchestration capability within an organisation?

• Importance of orchestration capacity

One of the most important capabilities for marketers is managing journeys throughout the customer lifecycle, not just across marketing channels. While most companies support journey automation, testing and optimisation across all digital channels, very few offer journey discovery capabilities that IDC considers critical to the entire customer experience (CX) lifecycle. Most of today's journey orchestration tools focus on specific use cases such as onboarding, activation, cart abandonment, churn, VIP/loyalty, and so on. From the customer's point of view, they are usually nothing more than a set of on-ramps and bridges without a data highway connecting them. What makes journey discovery different from current capabilities is that it uses the entire set of customer data across marketing, sales, commerce, finance, compliance, service, and support functions to inform marketers how different types of customers interact with the brand and how efficient those interactions are. The goal is to enable each customer to move to the next step in their journey.

• Importance of segmentation

Segmentation plays a crucial role in an omni-channel marketing strategy, enabling the personalisation and effective coordination of messages to specific audiences across multiple channels and devices. Through segmentation, companies can tailor their strategies to meet the diverse needs and behaviours of audience segments, contributing to an efficient customer experience and strategic differentiation in a mature market. Artificial intelligence and machine learning further support real-time segmentation and personalisation, which is critical to delivering a seamless experience for each customer.

• Importance of personalisation

Personalisation requires that the recipient's unique content is presented at the digital destination based on content from previous interactions, regardless of channel (e.g. the second channel experience builds on the first channel experience). The speed at which this is achieved is key to delivering a seamless experience to each customer. Not all interactions require real-time support all the time, but the inability to deliver in real-time, when needed, can be a problem for customers.

2 What relevance do these characteristics have in a less expansive economic context?

Main reasons why these characteristics are significant in a less expansionary economic environment:

- **Strategic differentiation:** In a less expansive market, competition can be more intense, making strategic differentiation crucial. Market strategy is a greater source of differentiation than product capabilities. Companies must stand out and offer unique value propositions to attract consumers in a challenging economic environment.

- **Operational scale:** In times of economic slowdown, companies must optimise their resources and processes. Operational scale becomes essential to adapt quickly to changing market conditions and deliver an effective and efficient customer experience.

- **Adapting to new channels and technologies:** Companies must be agile and willing to adopt new channels and technologies to reach consumers. Omni-channel marketing platforms help companies adapt to these changes and reach shoppers where they need to be reached. This is especially relevant in sectors with less experience in omni-channel or digitisation processes.

- **Data management and personalisation:** Data management and personalisation capabilities remain critical to delivering an effective brand experience, regardless of the economic climate. Companies need to know their customers, understand their needs and deliver relevant content to maintain customer loyalty.

- **AI/ML innovation and adoption:** Artificial intelligence (AI) and machine learning (ML) can help businesses optimise operations, improve personalisation and make data-driven decisions. In a challenging economic environment, innovation and efficiency are key to staying competitive.
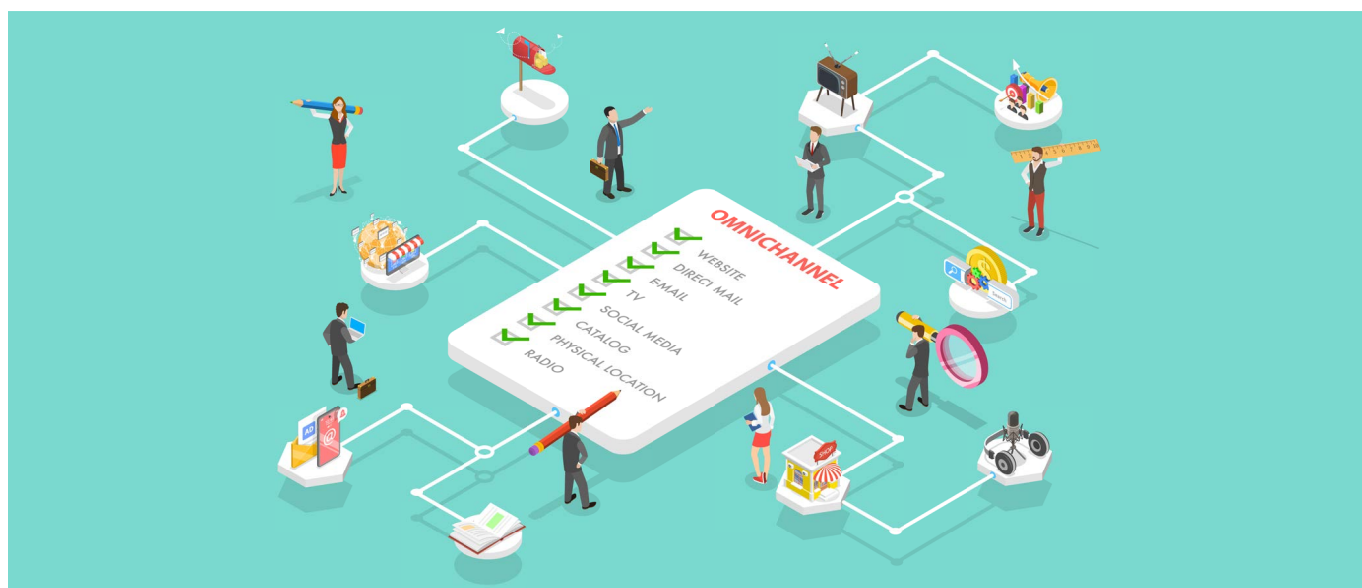
3   What would IDC recommend to anyone looking for a solution that allows them to have control over their data in a secure way?

In the current technological context, the so-called data sovereignty, a concept that links the location of data to its criticality, is of particular importance.

To develop these points, it is essential to begin by differentiating between data sovereignty, data residency and data localisation.

- The residence of the data refers to the geographical location where the information is stored.

- Data sovereignty refers not only to data being stored in a designated place, but also subject to the laws of the country in which it is located.

- Data localisation is the most restrictive concept, as it includes geographic residency based on local legal obligations, as well as the requirement that it be kept within the border where it was created.

Depending on the degree of criticality of the data, the regulation requires that the data be stored and processed or that a copy be kept within the country's borders.

The choice of localisation - where the hosting and processing of data is physically carried out on national territory by a local legal entity - is synonymous with security and trust for users and enables compliance with the legislative and regulatory framework both on-site and at European level.

In this context and affected by the European Union's General Data Protection Regulation (GDPR) and the Cloud Act, the law that allows the US government to view data hosted by US companies even abroad, data localisation has become a very relevant issue for companies as well as a matter of state in different countries or regions.

Finally, it should be noted that the concept of digital or data sovereignty is also related to the ability of an organisation to dispose of its own or its customers' data and to change providers without legal or technological problems hindering this.

4   Achieving an optimised Customer Journey for customers is the challenge facing all organisations, how does Artificial Intelligence (AI) help achieve this through a solution that orchestrates the martech ecosystem across different channels?

AI is rapidly changing customer and employee expectations of personalisation and efficiency and is expected to become ubiquitous across organisations in a short space of time. Users should explore how vendors incorporate AI into their roadmap, ensuring that these implementations are ethical and compliant, and that they demonstrate real value for their specific marketing use cases, not just an attractive novelty.

For omni-channel marketing platforms, AI enables personalisation of offers by optimising the customer experience. In fact, IDC forecasts that generative AI will take over 42% of traditional marketing tasks such as SEO, content optimisation, customer data analysis, segmentation, lead scoring and hyper-personalisation in the next five years. Generative AI technology enables marketers to improve customer effectiveness and efficiency without the need for technical skills, freeing them from manual tasks to focus on innovation and creativity.

5   Is it possible to combine omni-channel hyper-personalisation with the elimination of data silos in an organisation?

Data silos are one of the great enemies of hyper-personalisation. In this sense, one of the main advantages offered by omnichannel marketing platforms is integrated data management. Centralizing and personalizing customer interactions and orchestrating all initiatives from a single platform is made possible by their ability to be integrated into any channel—online, offline, inbound, outbound, etc.—and to consolidate all initiatives, communications, segments, and personalizations. This eliminates the need for external or isolated solutions.

About HCL Marketing Cloud

HCL Marketing Cloud aligns with the digital marketing trends outlined in this document to take the omnichannel customer experience to the next level. HCL Marketing Cloud is based on HCL Unica, a platform that has been helping the most important brands in the world for more than 30 years to provide the customer with the correct and hyper-personalized message, offer or promotion in any communication channel and with exceptional performance.

The features required for an omni-experience capability match the core competencies of the HCL Marketing Cloud platform:

- Recognize customer actions and changes in related events across numerous channels, including omnichannel and devices in real time.

- Allow real-time updating of campaigns and the customer journey, to improve their orientation.

- Facilitate the ability to support hyper-personalization of customers and prospects at scale.

- Provide targeted offers and promotions to each customer with high granularity to enable a higher conversion rate and inform future communications.

- All this taking full advantage of AI capabilities, perfectly integrated into the core of HCL Marketing Cloud, becoming an integral part of its functionality.

Practical AI is a key focus of HCL Marketing Cloud. By leveraging AI capabilities, the platform aims to significantly improve marketing effectiveness. AI-powered features and functionalities will empower marketers with intelligent insights, automation, and predictive capabilities to drive better campaign results and deliver personalized customer experiences.

HCL offers an intelligent, design-driven marketing platform that satisfies omni-experience requirements while amplifying the value of existing talent and assets, offering customers world-class brand experiences.

To learn more about HCL Marketing Cloud, visit www.hcl-software.com/marketing-cloud

About IDC

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