Digital by default:

Creating a strategy to thrive in a digital-first world

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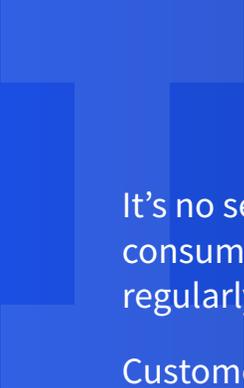
It's no secret that technology continues to reshape consumer expectations, which forces companies to regularly evaluate their digital strategy.

Customers now have hyper-connected, information-rich lifestyles that demand seamless experiences. A customer's first interaction with a brand is often online, making it all the more important to develop a strategy for your digital presence and processes.

Internally companies need to create a single source of truth for technology and employee transparency. While externally, customers now expect a new level of personalized experiences.

It's clear that businesses must digitize, but if you're not sure where your organization is in that process, it can be difficult to progress.

Where's your organization in the digital transformation journey?

Becoming digital by default is a process with many pieces to the puzzle. It's important to assess both internal and external elements throughout the journey to stay ahead of the competition.

At the start of your digital transformation, you rethink how to use people, processes, and tools. Systems that are manual or had an analog process are digitized, and initiatives are better aligned to your consumers' expectations.

As you progress in your digital maturity, you start to put digital first by prioritizing digital channels over traditional ones. This allows you to meet the consumer where they already are—*online*.

To fully optimize your efforts, embed digital into the core of your company strategy. Digitally mature companies have a roadmap in place that heavily relies on digital activities to drive growth. A digital strategy provides an agile environment for the inevitable change ahead.

Figure out where your organization is in the digital transformation journey by assessing your internal source of truth and external customer expectations.

Look Internal: Rally behind a single source of truth

By creating a single source of truth, businesses can accomplish two things:

1. Consolidate technology to streamline processes

2. Break down silos and increase team collaboration

Both are key to becoming an agile company in this digital-first world. Your data may flow in from multiple tools and channels, but having a single truth provides an accurate overview of business metrics for planning. Internal teams will have varying priorities, but breaking down internal barriers allows for a cohesive brand and collaborative culture.

Consolidate technology to streamline processes

More than **63% of IT professionals** planned to consolidate all collected data into a single plat-form in 2019. This allows teams to streamline processes for more efficient reporting and goal alignment up and down the line (and across business units).

Traditionally, marketing and sales teams have used different tools, processes, and frameworks—including different sets of data. This can lead to tool fatigue, under-used tools, or unmanageable data sets due to lack of governance. Ultimately, revenue streams are blocked because teams can't smoothly communicate data and information across tools. Sales and marketing can both be more successful if they combine data sources and consolidate tool stacks.

By consolidating your digital tool set, you can quickly get an understanding of what's performing and what needs to be adjusted. It allows for team alignment, knowledge sharing, and a faster response time – ultimately resulting in reduced costs and more revenue.

Break down organizational silos

Using a single source of truth and streamlining processes by consolidating tools has another major benefit for businesses: breaking down organizational silos.

As Forbes puts it,

> **Data silos impact every aspect of the business. They slow down the company, limit communication and collaboration, reduce efficiency, eat storage space, and decrease the quality and credibility of data."**

When different departments use different tools or data sources, it becomes more difficult to share common information. The problem becomes worse if those tools don't integrate with each other, creating massive data silos within the organization.

This has far reaching impacts on any business. When reporting doesn't include the whole picture, it leads to ill-informed decisions and opportunities to work toward a common goal are missed.

To combat this, organizations should take a step back to create a single source of truth that gives team members and leadership centralized visibility across departments—or, at the very least, consolidate their tools and processes.

By using a single source of truth, cross-functional teams will have a common language for better collaboration, as well as a single, trusted source for reporting.

Actionable tips for creating a single source of truth

- **Identify where you have data silos.**

  Compile a master list of which tools you use to collect which types of data. Look to see where you might be collecting duplicate data. Is one of those data sources more up to date or accurate than the other? This will help you evaluate which source should be your primary data input.

- **Identify where you have team silos.**

  Evaluate which teams have control over which data sets and processes. For example, does customer success have access to customer satisfaction scores but not marketing? Look to see which teams might have data gaps.

- **Cleanse your data.**

  Before you can create a single source of truth, data needs to be cleansed. As it is now, your data likely includes junk email addresses, outdated customer contact information, unusable phone numbers, duplicate emails for the same contact, etc. Go through the different data sets in your systems and cleanse your data so you have a clearer starting point.

- **Unify and organize your data.**

  Once your data is clean, you need to bring it into one system and organize the way it's structured. **Create unique identifiers for each contact** in your single system. Then, ensure data you import into that system from your various tools have consistent identifiers that associate that data with that unique contact (as well as identifiers about which system that data originally came from).

- **Create user permissions.**

  This is key for a secure customer journey. General Data Protection Regulation (GDPR) and other data privacy legislation means that access to personal customer information should be restricted. Give teams access to data they need and will find useful, but don't give everyone blanket access to all information.

Look External: Revamp the customer experience

As companies begin to digitally transform, they often focus heavily on their technology and people. The more important task, is delivering a better digital customer experience.

We operate in a world where customer expectations for brands are high. For both B2B and B2C businesses, consumers expect a top-notch experience from your organization. **Shep Hyken writing for Forbes said**,

> **Your customers no longer compare you just to your direct competition. You are being compared to the best service they have ever received."**

On top of that, 69% of customers expect "Amazon-like buying experiences," **according to a Salesforce study**—which makes sense when you consider the websites you use most often in your personal life: Amazon, Netflix, Twitter, YouTube, etc. All of these sites are easy to navigate and suggest more content, products, or accounts to follow based on your behavior. They're personalized and incredibly easy to use. As consumers, our expectations for websites have skyrocketed while our attention spans have decreased. Businesses have to adjust to meet those expectations or get left behind.

A smooth digital-first customer experience starts by having a deep understanding of their needs, and then delivering personalized experiences that address those needs.

Gain deeper customer insights

Customer data has become the key ingredient in providing a better customer experience, according to **Tom Davis**, Chief Marketing Officer at Forbes Media.

And there's good reason for that! Customer data allows teams to see the previous customer touchpoints, including support tickets, purchases, behavior, consumed content, and received emails. Traditionally, companies place data in the hands of IT or account management, but having a consolidated place for a full customer journey—that is accessible by the appropriate teams—ultimately creates a better customer experience.

A study by Aberdeen Group found that companies using analytics to craft customer engagement initiatives have significantly higher cross-sell and upsell revenues, better returns on marketing investment, and higher annual profits compared with those that don't.

Aggregate customer feedback in your single source of customer truth platform so your team can see overall trends, then drill down into individual responses for more information and follow-up.

Create personalized digital experiences

Users want personalized experiences when they interact with a brand. Creating valuable experiences starts with simply having deeper insights into customer goals, pains, and priorities throughout the buying process.

> **Brands don't communicate in one direction these days; it is a two-way conversation in real time with savvy and discerning customers,"**

says Carolina Martinoli, director of brand and customer experience at British Airways.

One way to marry data and face-to-face customer interactions in a scalable way is to build customer segments based on behavior data, and then talk to a representative group frequently.

This allows marketing teams to get more context for behavioral trends directly from customers.

For each stage of the buying process, use the learnings from your customer feedback initiatives to assess what your customers are thinking, feeling, doing, and the touchpoints they experience.

This will help you identify areas where you can solve problems, answer questions, provide inspiration, or put customers at ease. This helps you identify the experience gaps you have, while also providing you a timeline for when it should be presented to a customer on their journey.

Actionable tips for creating personalized experiences

- **Create representative customer focus groups.**
  If your company has clearly defined personas or ideal customer types, use those to create customer groups that reflect those personas. Meet with these focus groups about once a quarter to get feedback on company messaging, content, campaigns, and ideas.

- **Create personalized experiences in your advertising.**
  Identify which social media or media platforms your customer segments use. Then, tailor the messaging for your paid posts to each segment and their stage in the customer journey. And then, use detailed targeting options (including hobbies and interests) to get in front of potential customers.

- **Write more tailored emails.**
  Now that you have a better understanding of customer pain points, you can not only write more relevant subject lines and personalized emails, but you can also send longer-form content that customers and prospects are actually interested in.

- **Look into your keyword targeting.**
  [Alexandra Samuel explains](#) that "using [customer learnings] allows you to do smarter keyword targeting—for example, targeting one message about your programming game to parents who are searching for 'kids programming' and another message to parents who are searching for 'kids video games fun.'"

- **Think about what you can give customers next.**
  As you create more relevant and well-timed experiences, you can start to collect data on which offers or pieces of content have higher rates of success at each stage in the customer journey. Based on those success rates and the feedback your customer listening activities give you, your team can start to better predict the types of experiences your audience would like to see next.

While many companies have already taken strides toward a digital first mindset, it can often help to take a step back and reassess your strategy. To truly thrive in this ever-changing digital landscape, it is important to continually assess both internal and external factors. By defining and executing on a single source of truth, while continuously amplifying your customers' experience through ample research, you can reach your next digital growth milestone.

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