ATTIVIO®

ACTIVE INTELLIGENCE

Achieving Customer-Centric Online Customer Experience Management

Powered by Unified Information Access

An Attivio White Paper

Introduction: Serving Up a Menu of Highly Personalized Online Experiences

The next time you visit an upscale restaurant, you might find yourself seated at your favorite table, served the sparkling water you prefer with just the dark rolls you like in the bread basket and more – without making any requests. Hundreds of restaurants in New York City and beyond, eager to get a leg up in the fiercely competitive dining industry, carefully track individual tastes and habits of their customers to provide personalized service and encourage repeat visits and larger checks. Some restaurants even log data on *potential* customers to be prepared if a newcomer shows up.[1]

Enlightened restaurants and global businesses alike recognize those enterprises that understand the *context* of how their content is consumed will be much closer in the heart (and wallet) of that consumer.[2] Their content will be carefully personalized to meet the customer's unique needs and preferences – whether it's a four-course dinner, digital media or financial services on the menu.

The highly customer-centric personalization efforts by restaurateurs bear intriguing similarities to the highly personalized customer service experiences businesses strive to provide at all customer touch points – from personalized online experiences to personalized live customer interactions. It is the hallmark of organizations that have gone the extra mile from customer competency to customer *centricity* – orienting the business and decision making processes to best accommodate the needs and behaviors of its customers.

Clearly, there's a lot riding on crafting highly personalized, optimized online experiences that present the right content, offers, products, services and options to the right customers at the right time.

Successful online customer experience management that brings in new customers and retains and expands business with existing customers requires coupling compelling content with compellingly agile technology to overcome the most serious challenge noted by Forrester Research: siloed, disconnected enterprise information sources; without which customer experience management processes will remain frustratingly manual and unscalable.

This paper will explore this critical challenge and present *unified information access* as a vital enabling technology, led by Attivio's Active Intelligence Engine® (AIE®), providing agile integration and correlation of *all* related customer information – structured data and unstructured content alike.

You will also discover how organizations, from digital media to financial services, have successfully utilized AIE to serve up highly relevant, personalized, targeted online experiences that drive new business, at a fraction of the time and complexity of alternative solutions.

Forrester recently presented an impressive graphical representation of the different touch points throughout the customer lifecycle, along with some of the communications vehicles that play a role at each point *(see fig. 1).*
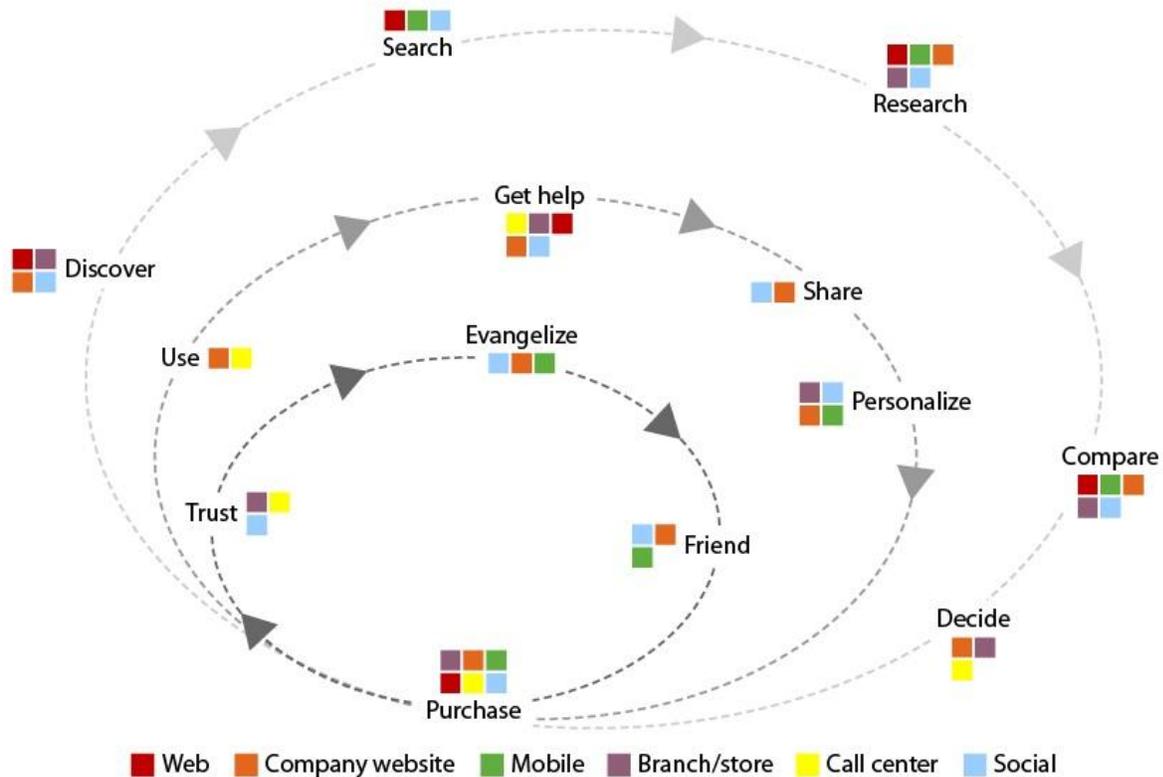

Fig. 1. Delivering cross-touch point customer experiences drives need for new capabilities. Source: Forrester Research, Inc. and published online by MarketLive-Blog.com (December 15, 2011).

What stands out is the customer's first experience with a business is invariably online, leading very early to an organization's website. Live interactions with a sales representative, for example, generally do not take place until after that initial critical online customer experience. Even after a customer decision is made to do business with an organization, the ongoing customer experience looms very large alongside live interactions with customer service reps and account managers.

Online customer experience management therefore is the initial calling card to engage prospective customers and then retain and expand business with them through subsequent repeated personalized online experiences, coupled with live customer interactions. Put differently, the customer experience management function lasts throughout the lifecycle of each customer. Clearly, the stakes for customer experience management have never been higher, with online web experience management playing a mission-critical role.

Forrester notes the key capabilities essential for effective online customer experience management:

- **Leveraging cross-channel data for targeted offers** based on business rules to provide targeted and personalized offers to the customer, leveraging multiple information sources such as web and offline advertising, traffic, sales, and CRM data to enable improved customer targeting
- **Personalized experiences across touch points,** incorporating personalization tools to drive product recommendations, offers, and content in an automated and scalable fashion
- **Dynamic sites built for unique, personalized customer experiences,** evolving from "page building" to pages built on the fly using page templates, leveraging search and personalization to drive the most relevant experience for users.[4]

Forrester goes on to call out the most serious roadblock faced by organizations to creating and managing effective customer experiences on their websites: ***the ecosystem of solutions in use are siloed***[5] ***– while prospects and customers interact with your organization without regard for those silos.***

These siloed systems in turn include a bevy of siloed information sources of relevant information for customers and prospects; structured and unstructured, internal and external:

- Website visitor information for anonymous visitors (cookied behavior, history, etc.) as well as authenticated/registered visitors and existing customers
- "Big Data" sources of activity such as clickstream data
- CRM, ERP and other databases for such data as past customer transactions, account history, etc.
- Customer documents stored in SharePoint and document management systems
- Customer/prospective customer data warehouses
- Customer *sentiment* expressed in text communications, whether direct with an organization or
- Corporate online community content and other online resources, and still more

Eliminating *All* Enterprise Information Silos with Unified Information Access

A recent Attivio white paper, *A Maturity Model for Customer Centricity*, explored the importance of a *360 degree view of the customer to* maximize successful, lucrative direct interaction with customers. A true 360 degree view will empower sales, service and account management professionals, by providing complete insights into past transactions and account history, *correlated with interests and feelings expressed about the company and its products*. The benefits are clear: organizations deliver seamless customer service for maximum loyalty and retention; enable effective, targeted marketing and sales campaigns for substantially increased revenue from existing customers; and cultivate long-term business relationships that expand "wallet share."

Unified information access (UIA) technology makes this true 360 degree view of the customer a reality by freely integrating, correlating and presenting *all* siloed enterprise information sources – structured data and unstructured content alike.

The very same unified information access technology platform that powers a true 360 degree view of the customer for can also be leveraged for highly personalized, engaging customer web experiences.

Attivio's agile unified information access platform, the Active intelligence Engine, provides real-time content personalization and optimization vital for engaging online customer experiences that drives business. Key capabilities include:

- **Dynamic content enrichment and presentation.** Attivio AIE instantly generates everything from suggested search terms to content recommendations, topic pages and full-blown microsites – created in real time in response to business rules for personalization and online behavior.

  Attivio makes the presentation of highly personalized, dynamic creation possible through advanced text analytics that create additional metadata on top of your content set – identifying and tagging entities such as people, places, companies, and locations. Key phrases or multi-term concept phrases are also automatically identified. All this information is then tagged to its source document, enriching it for future discovery and targeting.

- **Personalized content recommendations.** Attivio AIE interactively recommends relevant information the user might never have thought to look for, enabling deeper engagement with existing and prospective customers that drives new business. This includes relevancy-driven recommendations based on implicit knowledge about each anonymous site visitor (visitor's referral site, search terms entered in the search box, articles consumed and the topics or concepts of those articles, number of page views, etc.), and explicit knowledge of known, "logged-in" customers or members (past transactions, previously expressed sentiment towards company products, demographic data, etc.).

  Additionally, AIE *behavioral analytics* analyzes historical activity data, such as purchase history, to identify online viewing and/or buying patterns to make recommendations for products, articles, etc.

- **Sentiment analysis and classification.** As alluded to previously, Attivio AIE can analyze text-based communications, both internal (email, IM chat, surveys, phone call transcripts) and external (social

media, blogs, other online resources) and determine the level of favorable or unfavorable sentiment towards particular topics or entities discovered in the document.

Sentiment levels calculated by Attivio AIE can be used to influence recommendations and relevancy for a user in a variety of ways, including directly (if the user issuing the query has expressed specific sentiment), per-topic, or using an audience segmentation model to deliver a more personalized experience.

Unified Information Access in Action: Personalized Online Experiences that Drive User Engagement and New Business

Driving a New Level of Online Engagement for Sports Fans

The Sporting News, a leading sports fan website, turned to Attivio AIE to improve its customer engagement and personalization strategy to thrive as an all-digital publisher. Online sports media is a highly competitive market. In addition to increasing monthly page views and page views per visit, Sporting News recognized the need to empower its editorial team with improved tools to stay on top of the latest, top-trending sports topics.

Sporting News recognized two key audience types: casual sports fans who tend to visit the site through links from AOL (Sporting News' top referral site in the US) and via Google/search engines, and diehard sports fans who often access the site directly or via Sporting News' social media links.

Attivio AIE serves Sporting News as a real-time ecosystem and architecture that enables dynamic, personalized online experiences for its visitors. AIE begins with integrating and indexing all Sporting News content and data, including:

- Sporting News' original news and editorial content, as well as from external partner sites – including expanded metadata as noted above
- Editorial business rules, as defined by Sporting News using internal-facing editorial dashboards, such as specifying desired content to "spotlight" to all visitors; relevancy boosting based on trending topics, whether a visitor is a casual or diehard sports fan, etc.
- Internal website data (Omniture analytics, web logs of individual page views per session, etc.), used as criteria for relevancy boosting as noted above

AIE universally indexes all of this information to correlate and present the most relevant content for each visitor, providing a highly engaging, personalized user experience, including:

- Dramatically improved search experience, including predictive type-ahead search box; categorized search results, including relevant shopping items to expand eCommerce
- Recommended additional content of most interest, based on casual or diehard visitor profile segmentation, articles viewed previously, previous search box query submissions, enacting editorial business rules, and more
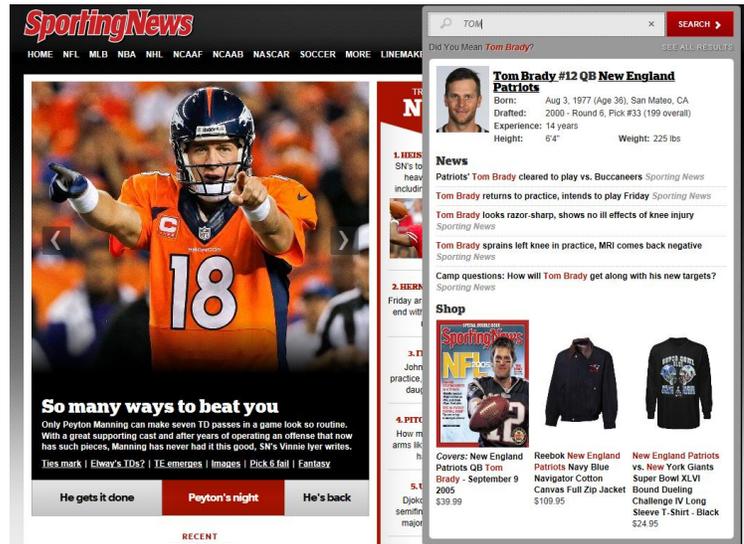
The newly personalized Sporting News experience has already yielded a 50% boost in page views, leveraging individual behavior to deliver the right content, at the right time on the right device.

Powering Highly Personalized Online Experiences for High Net Worth Private Banking Clients

The private banking division of a leading global financial services organization wanted to improve its customer service and engagement, increase up-sell/cross-sell revenue and expand its customer base. The private bank selected Attivio AIE to power a dashboard providing a personalized 360-degree view of each high net worth client. Currently accessed by private bankers on behalf of clients, the dashboard will soon provide clients themselves with direct access, for a first-hand, highly personalized online customer experience.

The private bank's 360-degree investor dashboard unifies such previously siloed structured and unstructured data sources, including:

- Account transactions, trends and performance of current investments
- Demographic data
- Details of all available banking products and services, tailored to specific customer interests, likes and dislikes
- Investment research content
- News related to client investments – and even about the clients themselves... and more

Today, thousands of private bankers around the world can get a comprehensive view of their clients using an iPad application. A complex security model is applied to all sources of information, which Attivio AIE enforces in real-time.

The private bank has recognized that long-standing senior clients will increasingly leave assets to younger family relations, who will want to interact directly with their information online rather than by phone with a banker. The company will soon provide direct client access to its highly personalized investment dashboards – which Attivio AIE will easily support with its *Active Security* model and unified information access platform agility.

Conclusion: Unified Information Access Delivers Web Engagement that Facilitates the Buyer's Journey

Content marketing expert and author Robert Rose recently explained why marketing processes must change dramatically from years past. Media filtering technologies such as Netflix, Spotify and Twitter allow consumers to pinpoint what information they receive according to their specific interests, weeding out advertisements and extraneous information. Years of exposure to these technologies, Rose explained, has trained consumer brains to serve as media filters; a consumer looking at an online or physical environment full of marketing messages will only see the ones that meet a particular interest at that moment. [7] Since consumers now effectively tune out any message they don't want to receive, it is imperative that messages be tailored in a customer centric manner, accommodating the unique needs of each customer.

"We must facilitate the [customer's] journey," said Rose. "Web engagement management [aka online customer experience management] is about *delivering value to the customer every step of the way*."[8]

Attivio AIE is particularly well-suited to empower the online journey of your customers, by enabling highly engaging, personalized online customer experiences. This in-depth personalization is made possible by leveraging *all* related data and content, freely integrated and correlated from enterprise information silos, in ways other solutions simply cannot match.

About Attivio

Attivio's [Active Intelligence Engine®](#) (AIE), redefines the business impact of our customers' information assets, so they can quickly seize opportunities, solve critical challenges and fulfill their strategic vision.

Attivio correlates disparate silos of structured data and unstructured content in ways never before possible. Offering both intuitive search capabilities and the power of SQL, AIE seamlessly integrates with existing BI and big data tools to reveal insight that matters, through the access method that best suits each user's technical skills and priorities. Please visit us at www.attivio.com.

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Footnotes

[1] Suzanne Craig, *What Restaurants Know (About You),* New York Times (September 4, 2012).
[2] Tjeerd Brenninkmeijer*, Real-Time Context is the Heart of Customer Experience Management*, CMS Wire (December 6, 2012).
[3] Scott Brinker, *5 Meta-Trends Underlying Almost All of Modern Marketing,* Chief Marketing Technologist (October 22, 2012).
[4] Brian Walker, Forrester, *CXM Solutions Visible on the Not-So-Distant Horizon* (August 10, 2011).
[5] Brian Walker, Forrester, *The Emergence of Customer Experience Management Solutions* (August 18, 2011).
[6] Brinker.
[7] Dan Berthiaume, *Rethinking Web Engagement - Leading with Content Marketing*, CMS Wire (August 13, 2012).
[8] Ibid (emphasis added).