

**PRIORITY:** Data, Technology, and Measurement

**MANDATE:** Lead the business and cultural transformation that is empowered by data and technology.

**WHY IT MATTERS:** Brand advantage is increasingly becoming based on how information is used in service of every interaction.

## OBJECTIVE

Help CMOs better understand how to compete effectively on personalization, drawing on brands with experiences using new tools and focusing on core issues of strategy, operations, and organizational change required to scale personalization and realize potential ROI.

## DISCUSSION FOCUS

Personalization at scale remains a top priority for many CMOs across industries, regions, and company sizes. Technology behind personalization at scale is always advancing, but in terms of how an organization adopts the practice, the fundamentals remain the same: deliberately think through the experience, data flows, and support that enable an ideal customer experience.

## USE AI TO DELIVER IDEAL PERSONALIZED EXPERIENCES

This approach prioritizes data, decisioning, design, distribution, and the development of corresponding capabilities to deliver personalization at scale.

### 1. INTEGRATE a wide range of data feeds for context and signals

Use intelligence to combine disparate sources of information to identify signals that will drive finer targeting and more relevant personalization.

### 2. DISCOVER who, what, where, when to reach out

Take information gleaned from past interactions or existing sources and use it to hyper-customize the shopper's experience.

### 3. ENGAGE through personalized interactions

Use innovative data management to create seamless, personalized journeys so compelling that once customers encounter them, they won't consider competitors.

### 4. ACTIVATE the customer to use data to find value

Reconfigure the classic consumer decision journey model by compressing the consideration set and streamlining the evaluation phase, to deliver customers directly into a "loyalty loop."

### 5. LEARN by continuously testing and optimizing

Ongoing agile experimentation and active analysis of needs, technologies, and services help spot opportunities to extend the customer relationship.



*Hosted by Dave Edelman, former CMO at Aetna and long-standing thought leader in personalization and agile marketing, this intensive training brought CMOs from around the world together to unlock the power of new analytic tools enabling personalization at scale.*

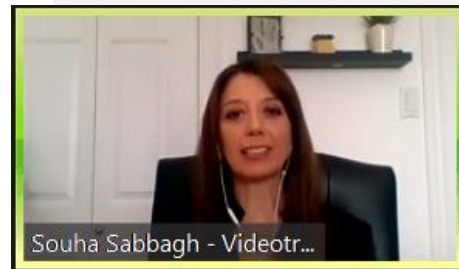
## KEY TAKEAWAYS

- 1. Build business models around the customer journey.** If customer experience lies at the forefront of every strategy, then it will build trust with customers. And customers will be more likely to give you an initial pass for mistakes.
- 2. Customer journeys are often nonlinear and cut across many disparate parts of an organization.** Organizing your strategy around journeys can help you align all touchpoints across the enterprise.
- 3. Media is the biggest investment marketers make.** It should be managed with the same rigor as a Wall Street hedge fund.
- 4. Media and emotion need balance.** AI can optimize performance, yet it is critical not to lose sight of emotionality needed to build brand preference. Adopt agile test learn and apply methodologies to strike a balance.
- 5. You can't optimize every journey.** AI will enable you to optimize the highest value ones.
- 6. AI enables more and different types of tracking.** Econometrics modeling done in real time can identify new relationships between different marketing touchpoints at scale.

## VIDEOTRON: A CASE STUDY IN AGILE PERSONALIZATION

**How do you manage customers to shift their behavior from traditional ways of interacting with you to more efficient channels?** At Videotron, “channel shifting” became a top priority as they underwent a digital transformation.

To start, Videotron analyzed interaction costs across all touchpoints – from retail, phone, and digital. Their goal was to optimize each channel to drive shifting. Working with Pointillist, Videotron deployed journey analytics software to look backwards and identify why customers were engaging – and where they were engaging from. By identifying specific areas along the journey where customers had issues, Videotron was able to address each area. The AI capabilities provided by Pointillist helped identify the granular breaks in the experience and design new, more cost-effective solutions.



Souha Sabbagh - Videotr...

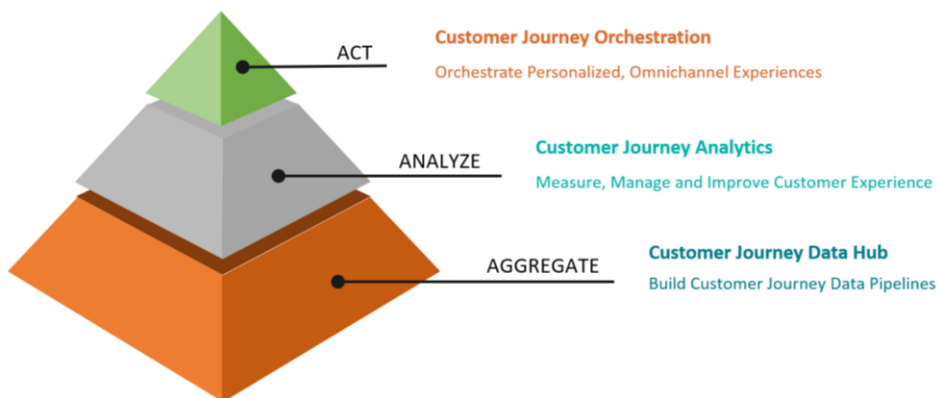
*“AI created the delta – identified triggers and made them actionable, so that we could improve the customer journey.”*

**SOUHA SABBA,**  
Sr Director Advanced Analytics



### A True Customer Journey

Management Platform



Pointillist

Pointillist provides customer journey analytics software that enables marketing teams to discover the most important opportunities and obstacles faced by their customers, and act by providing an optimal, personalized customer experience—at scale.

## PIAGET: A CASE STUDY IN ARTIFICIAL INTELLIGENCE TRANSFORMATION

**Delivering on-brand personalized messages is key for Piaget, where image, branding, and customer relationships must achieve the highest standards.** Piaget looked to raise the bar for digital media management and engagement by investing in automation and personalization. To accomplish this, the luxury watchmaker partnered with Elsy Global for its media automation, delivery optimization, and in-depth reporting.

Planning and buying media manually around the world was a huge undertaking for Piaget. Elsy Global provided an AI-based solution that enabled them to streamline media operations while focusing on strategic insights. Elsy helped to evolve the digital marketing capabilities and increase efficiency, all while ensuring our brand integrity.



Sharannath Mohanram - ...

*“There is a lot of inefficiency in media buying. AI helped us to optimize our media budget.”*

**SHARANNATH MOHANRAM,**  
Head of Global Media

PIAGET

### Next Generation

Media Investment Optimization

Use AI to plan, monitor and optimize complex media portfolios, across all paid platforms, at micro-granularity – through the entire campaign lifecycle

#### Algorithmically Optimize Media Plans

#### Monitor Performance in Real Time

#### Rebalance for Maximum Returns



- **Omnichannel** – All paid media channels
- **Granular** – Down to platforms and tactics
- **Data-Driven** – Fully harness available data
- **Algorithmic** – Leverage advanced algorithms
- **Outcome-based** – Predict and optimize KPIs
- **User Controlled** – Apply guardrails, set goals

- **Integrated** – Reconciled against Plan, Forecasts
- **Always-on** – Low-latency daily monitoring
- **Transparent** – Full data access and control

- **Agile** – Rebalance based on latest performance
- **Predictive** – Quantify, track KPI improvements
- **Flexible** – Activate with existing buying partner

Elsy

Elsy helps advertisers optimize complex portfolios of granular investments across all paid media platforms to maximize growth and ROI.

**Scaling Personalization:  
Mastering the Transformation**

*Personalized Customer Experiences*

**BUILDING EXPERIENCE ENGINES**

**Marketers are using AI to handle the explosion of complexity.**

This richness of data and media creates tremendous opportunity. But trying to sort through this complexity using the old methods is impossible. To take full advantage of it, marketers need AI.

The next generation ecosystem of marketing technologies and services that are becoming available leverage Artificial Intelligence that optimizes for the left brain, together with copywriting, design, and delivery personalization that scales the right brain. And then bringing both into marketing organizations built for agile, iterative modes of operating through non-stop testing and learning.

- **VISION FOR DATA** first, personalized, always-optimizing the CX and engines to drive it
- **DATA STRATEGY** sourcing, integrating, analyzing, maintaining, optimizing
- **ANALYTICS ENGINE** decisioning, simulation, and optimization
- **TECH PARTNERSHIPS** for tools, services, integrations
- **ORGANIZATION AND PROCESSES** "product management" of engines that constantly improves value

**CHALLENGES**

- **360 Degree View.** Often, the tools that marketers use to capture data don't understand multiple channels. In this case, the challenge becomes stitching together customer interactions across channels to create 360-degree view of the customer.
- **Visualization.** Marketers need tools that provide visual cues of the customer journey, so that they can identify patterns of behavior that can be optimized.
- **Media campaign management.** Paid search, paid social, display – marketers must manage an infinite array of channels. Yet, they are often managed in very siloed ways, making channel optimization difficult. And, in the cookie-less future, this will become even more challenging.
- **Balance.** Performance is important for managing media campaigns. Yet, brand desirability and preference are critical elements as well. Don't lose sight of the fact that brand building is emotional – and not incorporated in Media AI.

**BENEFITS**

- **AI can accelerate learning from data, so that marketers can build business models around the customer journey.** Companies are sitting on decades of data that can be used to help set and effective data strategy. AI can help unlock that legacy data, from across the enterprise.
- **Machine learning can extract data from every single media touchpoint.** This enables marketing mix modeling in real time, resulting in more accurate media investments.
- Media agencies now have an opportunity to become more strategic. AI is changing the nature of the relationship between marketers and their agencies. While marketers are picking up more of the analytics, agencies are becoming more strategic and creative.

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*PGIM Investments*

**ZENA ARNOLD**  
*Kimberly-Clark*

**MATT BEREDA**  
*Lenovo U.S.*

**LYNN BLASHFORD**  
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**UP NEXT: | May 25, 11 A – 12 P (ET)**



**THE FUTURE OF THE PERSONALIZATION TECH STACK**

*Featuring Scott Brinker*

- VP Platform Ecosystem at HubSpot
- Editor at chiefmartec.com
- Program Chair of MarTech

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