Expert Group

People-Based Marketing

Putting the Customer First

Takeaways

If you want to successfully implement people-based marketing in your organization, you need to consider the following points:

- A clear and consistent customer strategy.
- The customer journey as a point of departure for the internal organization and marketing efforts.
- Determine what data you have and how you can use it relevantly, or what data you intend to collect.
- Make sure you have the in-house skills you need.
- Measure customer satisfaction across the entire journey.
- However – above all – create customer value by being relevant!

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Organizations Must Adapt to Consumer Expectations and Trends

Big-name stores are closing down, more packages make their way to consumers' homes than consumers making their way to stores, many consumers are dissatisfied with the service they receive in stores, traditional stores have difficulty managing their online operations, consumers switch easily between brands and have no trouble purchasing items internationally, and while data is available, it is not shared with the objective of improving the customer experience. ... And all this is just the tip of the iceberg! These trends cannot be ignored by organizations, specifically those operating in the retail industry.

While many retailers tend to have high expectations of – and invest in – online shopping, this is not the be-all and end-all for many consumers, who like to take time to visit brick-and-mortar stores. A total of 73% of consumers even state they prefer to receive advice from store employees.[1] It is therefore not about understanding channels, but about understanding customers!

Relevance is the Key to Growth in Retail

Numerous organizations vie every day for the attention of customers and potential customers through commercial messages – an average of more than 350 times, to be exact! This advertising overload has increasingly turned people away from advertising, which means that even advertising of interest to the consumer no longer registers with them. It is important to invest in relationships between organizations and individuals by being relevant at all stages of the customer journey. If we are to see growth in the retail business, we need to put customer needs front and center.

56% of people aged between 18 and 35 are willing to share personal data to ensure a more personalized experience, versus only

38% of baby boomers.[2]

In this blue paper, we discuss how relevance plays a role in building relationships with consumers even before a transaction has been completed. This requires that the organization thinks and acts based on a *customer-centric* approach. We use the LEAN principle to demonstrate how organizations can modify processes and ensure their continued operation. *Customer journey mapping* and *blueprinting* help to gain customer insights, so we can be relevant at the times that matter. Data plays a vital role in this process. Based on our BIPS model, it is easy to determine whether you have the data required to use people-based marketing successfully.

> **What Is People-Based Marketing (PBM)?**
> People-based marketing is a holistic approach that puts
> people first: the individual – rather than the organization or the product – is the
> point of departure. All individuals have specific needs and requirements, and
> organizations attempt to accommodate these as effectively as possible – think of
> it as finding a unique consumer DNA.

Consumers are aware that we store a significant amount of data on them, and we have a duty to use this information and data responsibly, serving the consumer. Maximum integration of marketing, sales, service and logistics – and the exchange of data between these areas – ensures authentic and meaningful interactions that help create positive memories. In addition, it is important for organizations to work on building trust and make allowances for the rhythms of individual consumers. This means the customer experience must be positive, personal and consistent throughout the entire customer journey.

Retailers Struggle to Provide a Consistent Customer Experience

We have observed that retailers continue to have trouble creating a consistent and personal customer experience across all touchpoints.

Research shows that a positive customer experience can result in:
- 1.6 times more growth on an annual basis;
- 1.7 times higher retention rate among customers;
- 1.6 times higher customer satisfaction rate.[4]

This means there are enough reasons for retailers to change strategies.

> More than **30%** of marketers feel they deliver a positive customer experience, while this is
>
> confirmed by only **15%** of consumers![3]

Research Question

> How can the retail sector become more relevant to consumers? **?**

The People-Based Marketing Framework

In order to make the process easy to follow and take successful steps, we have developed a framework based on four key elements of people-based marketing.

Domain	Topic	Tools
1. Engaged	How do we become relevant to consumers?	6R model
2. Flexible	How do the organization and processes adapt to the customer?	LEAN, Merkle Mindset
3. Accessible	Who interacts with the organization, and where and when do they do so?	Persona description, journey mapping/blueprinting, Merkle Mindset
4. Available	What customer data do you need?	BIPS model

3   SELLIGENT GLOBAL CONSUMER SURVEY 2019
4   DENTSU GLOBAL CMO SURVEY 2018 AND 2019

1. Engaged: How Do We Become Relevant to Consumers?
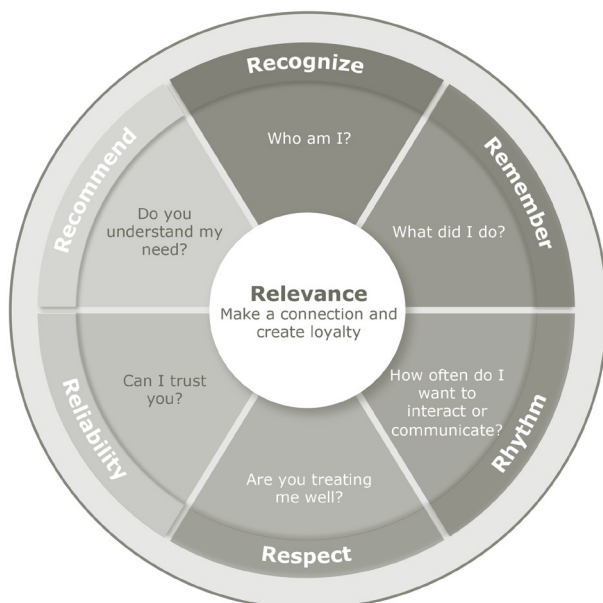
Relevance is the keyword in people-based marketing. This enables you to stand out again amid the flood of communication messages and to get inside the heads of consumers during the decision-making process. Since relevance plays a role across all stages of the customer journey, you need a link between the media domain and the CRM domain within the organization.

1.1 How Do You Determine Relevance?

Relevance related to people-based marketing is divided into six elements (known as the "6R model"): Recognize, Remember, Rhythm, Respect, Reliability and Recommend. All these elements must be implemented at a sufficient level in order to be perceived as relevant by consumers. The correct use/application of data is a success factor for each of these elements.

1. **Recognize: Identify Your Customer in all Their Various Guises**
   It is crucial to recognize customers at every stage of the customer journey. There are an infinite number of tools available for this purpose; sometimes, this is restricted to recognizing proxies, while at other times it is limited to recognizing authentic, unique individuals.

2. **Remember: Both the Why and the What**
   A total of 65% of consumers are more likely to shop at retailers (online or offline) that remember their previous purchases.[5] Being aware of your customers' histories means knowing what they purchased, viewed and consumed, as well as why they made these decisions. This information enables organizations to ensure a consistent and relevant experience across all touchpoints.

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5 ACCENTURE RESEARCH 2016, DELIVERING ON THE PROMISE OF PERSONALIZATION.

3. **Rhythm: Respect the Customer's Rhythm**
   It is important to recognize the customer's individual rhythm. How often do they interact with the organization or with the information on offer? The value for the customer can be increased by recognizing and anticipating this. If your organization fails to adapt to the customer's rhythm, they will end up not using the information at all, or (in some cases) even become annoyed.

4. **Respect: if You Respect the Need, the Sale Will Follow Automatically**
   Doing business involves building relationships, but unfortunately most companies continue to operate based on a sales-first mentality. However, respect in marketing is about first building a relationship with your customers and prospects, after which you tell them about the benefits of your product or service. This helps you create a need to start using your product or service in a natural way.

5. **Reliability: Be Authentic and Assume Responsibility**
   How reliable am I as a brand? Since consumers are progressively losing their trust in organizations,[6] it's more important than ever to truly be trustworthy as an organization. In order to develop trustworthiness, brands must adopt principles that respect and value the scarcity of people's time.

6. **Recommend: Provide Advice with Feeling**
   Consumers increasingly put stock in personal recommendations, but due to lower confidence in organizations, recommendations and reviews from other customers are also becoming more valuable. At the same time, the organization also becomes more relevant to customers, as they feel that the organization understands their needs. A total of 58% of consumers state that they are more likely to make a purchase if a retailer makes good recommendations.[7]

Relevance
By implementing all six Rs from the model at the appropriate level, you can ultimately become the most relevant to your customers. The model serves to monitor all elements on an ongoing basis and measure them to the extent possible.

1.2 Points to Note for Relevance and Personalization
Below are a number of points to note in terms of demonstrating engagement with consumers and building relationships with them.
- For some low-interest (that is, repeat) purchases, it is not always relevant to enter into a close relationship with a customer; instead, selling your product efficiently might be sufficient.
- In some cases, consumers will view excessive personalization as "creepy". Research conducted by KPMG shows that facial recognition falls into this category.[9]

> **While 71%** of consumers feel personalization is important,
>
> **71%** also state they feel privacy is more important than online experience.[8]

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6 IPROSPECT – FUTURE FOCUS 2019 – SEARCHING FOR TRUST
7 ACCENTURE RESEARCH 2016, DELIVERING ON THE PROMISE OF PERSONALIZATION.
8 SELLIGENT GLOBAL CONSUMER SURVEY 2019
9 KPMG 2018 – A DIGITAL WALK TO REMEMBER

- Face-to-face contact is often the preferred (and therefore most relevant) customer experience, particularly when it comes to more complex purchases.[10]
- Personalized experiences contribute to meaningful interactions; consumers perceive this to be the main driver for excellent customer experience.[11]

2. Flexible: How Do Organizations and Processes Adapt to Customers?

In order for organizations to remain afloat in a rapidly changing market, adopting a strategy of customer centricity is a given. The number of retail chains that can grow based on a value strategy of operational excellence is growing smaller.[12] In addition, operational excellence is more of a prerequisite or hygiene factor for organizations these days. Product leadership and, in particular, *customer intimacy*, are familiar value strategies that result in revenue growth and customer growth.
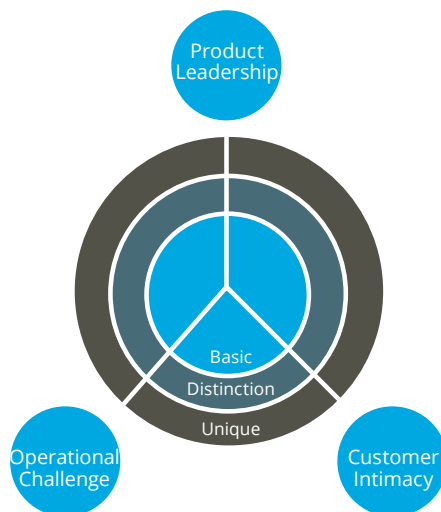
Customer intimacy and people-based marketing have the most commonalities: both are based on in-depth understanding of the customer – an understanding of both historical behavior and potential interests, and of the various differences between customers. This means that:
- retailers aiming to grow on the basis of a people-based approach must choose customer intimacy as a value strategy for their company;
- they must have a solid understanding of their different types of customers and have a comprehensive customer view based on customer data as a relevant tool;
- they must be willing to support their customers throughout the customer journey using content, products and services that are as relevant as possible.

10 GFK CONSUMER SURVEY 2019

11 KPMG 2018 – A DIGITAL WALK TO REMEMBER; SEE ALSO THE MORE RECENT REPORT, WWW.SELLIGENT.COM/RESOURCES/ANALYST-REPORTS/SELLIGENT-GLOBAL-CONNECTED-CONSUMER-INDEX/ARCONSUMERINDEXUS.

12 SEE: TREACY & WIERSEMA, "THE DISCIPLINE OF MARKET LEADERS, CHOOSE YOUR CUSTOMERS, NARROW YOUR FOCUS, DOMINATE YOUR MARKET," JANUARY 1995.

According to Zeithaml, Lemon and Rust[13], customer revenue or customer value increase as a result of an effective interplay between three factors, through:
- a distinctive and valuable brand (brand value);
- a distinctive product or service portfolio (product value);
- a relevant and valuable customer experience and customer relationship (relationship value).

People-based marketing focuses on the process-based development of relationship value (and, by implication, overall customer value) through the use of customer information (data and targeted market research), through process automation (where relevant) and with relevant tools and the right talents.

Brand Value

Customer Value

Product Value

Relationship Value
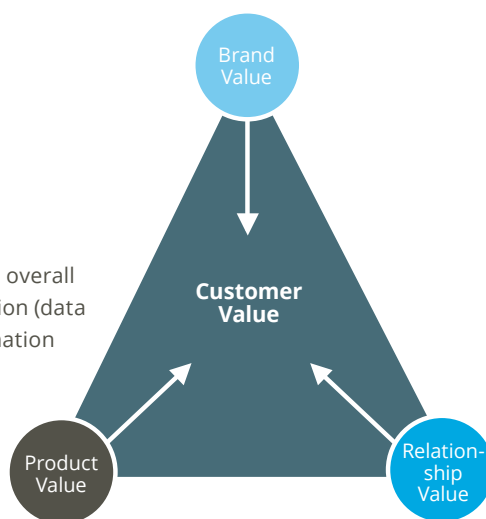
Aviva transforms through data integration and a customer-centric focus[14]

A financial services provider established 300 years ago with deep-rooted traditions yields phenomenal results by transforming the "siloed" organization into agile teams and a customer-centric approach. This required that product-driven marketing strategies shift to customer-centric communications. In addition, the often obsolete technology had to be replaced by technology that facilitates linking online data with the CRM. However, without a reorganization of the marketing department involving a genuinely agile model, this had not yielded many results.

The teams were redesigned in order to work based on consumer insights. Their agency operates between these teams on a daily basis and offers a completely agile team to turn the new approach into a success. By using consumer insights, new technologies and a new organizational approach, Aviva no longer decides what product to sell, but what is good for the customer!

50%
more outgoing offers based on behavior

70%
lower costs per acquisition in search

32%
increase in open ratio of emails

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13 SEE: ROLAND RUST, VALARIE ZEITHAML AND KATHERINE LEMON, "DRIVING CUSTOMER EQUITY: HOW CUSTOMER LIFETIME VALUE IS RESHAPING CORPORATE STRATEGY," FEBRUARY 2001.
14 READ THE FULL CASE: WWW.MERKLEINC.COM/EMEA/THOUGHT-LEADERSHIP/CASE-STUDIES/DATA-INTEGRATION-ORGANIZATIONAL-RESTRUCTURING-TRANSFORMS-AVIVA

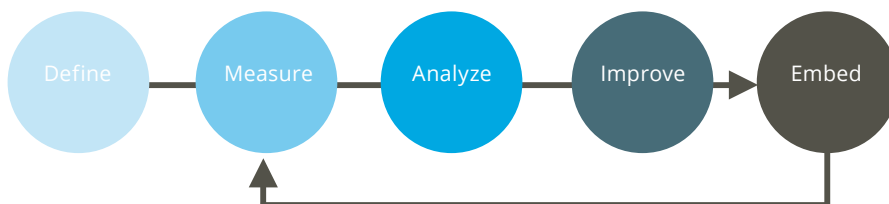## 2.1 Five Requirements for a Successful Transition

There are five requirements for turning people-based marketing into a success:

1. Start by developing a clear customer strategy that suits your company's overall objectives, goals and strategy – which must also be supported by the executive board and management.
2. Take the customer journey as a point of departure for the customer-oriented organization of internal processes and procedures. Elsewhere in this blue paper, you will find information on how to go about this. Develop the journey of a specific customer segment together with employees from your company's customer-facing departments.
3. Determine which data points you can cover through process during the customer journey. Elsewhere in this blue paper, you will read more about recording and using data.
4. Make sure the internal processes are modified and that the required skills are available in-house in order to translate new customer information at a tactical and operational level.[15]
5. Ensure that you can measure customers' expectations during the customer journey and can exceed these at crucial times in order to create relevant memorable experiences.

2.2 How Do You Make the Transition to Customer-Centric Operations?

LEAN is a practical way of adapting the company's processes and procedures to customers.[16] This method for optimizing production processes can also be readily applied to improve customer experience using a process-based approach. LEAN is divided into five process steps.

Below we indicate for each step what you should be thinking about and what questions you should ask yourself.

Process step	What should you be thinking about?	What questions should you be asking yourself?
Define	• Identify the problem. Which customers are disadvantaged by this problem?	• Scope: what does the problem involve? • What constitutes (hard/soft) income/expenditure? • What is the plan? Which critical stages?
Measure	• Collect and measure the data required.	• How big is the problem? • What information/data do I need? • Is the information gathered valid? • How will I collect the information 24/7?

15 WWW.WONDERFLOW.CO/BLOG/HOW-TO-BUILD-A-CUSTOMER-CENTRIC-CULTURE
16 FURTHER INFORMATION: WWW.SIXSIGMA.NL/DMAIC-3

| Process step	What should you be thinking about?	What questions should you be asking yourself?
Analyze	• Set out to find cause-effect relationships.	• What is causing the problem? • What causes can I identify? • Which priority will I give to investigating this in greater detail? • What is the root cause of the problem?
Improve	• Conceive, test and implement solutions.	• Choose the best solution (probability of success; efforts). • Test, measure and implement.
Embed	• Embed the solution in the organization in order to avoid setbacks.	• How can I embed the solution? • How do I visualize the development? • How should I respond to any irregularities?

If you have managed to make the organization more flexible using the method above, you need to get a clear view of your customers. Knowing how and when consumers interact with the organization and knowing what the needs are at each specific time. In the next chapter, we'll take a look at how consumers can be reached and what methods and tools are available to identify this.

3. Accessible: Who Interacts with the Organization, and Where and When Do They Do So?

As an organization, you're looking for the right balance between what is important to the customer and to the organization; that is, the balance between the customer experience and your enterprise value. This *customer value*-driven method and the combination of data, technology and creativity help us to provide better services to our customers. We know that personal relevance – for example in campaigns, service designs or product development – leads to better results.

This customer-focused approach requires that an organization really knows its customers, and, as noted in the previous chapter, the organization must be adapted and have decision-makers and operational teams that are agile. In addition, the organization must have access to technology, data and expertise that support these processes and procedures and agility.

The Merkle Mindset is an effective approach for identifying the required change; his model enables you to analyze each challenge and take it on using pragmatic insights.[17]

Align   Research   Define   Ideate   Validate   Delivery

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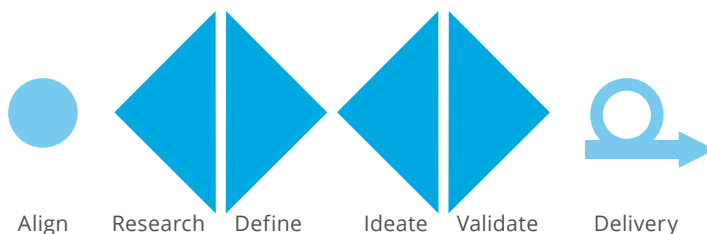
17 THIS MODEL WAS CREATED BASED ON, AMONG OTHER THINGS: DESIGN THINKING, SERVICE DESIGN AND BLUEPRINTING, LEAN STARTUP, SIX SIGMA, BUSINESS MODELING AND MCKINSEY WAY-OF-WORKING.

Step 1 of each chapter starts with *Align*. We must first agree on the '5xWH' with the parties concerned: What are we going to take on or resolve, why do we do this (i.e., with what tangible goal) and when, where, with whom and how we will do this?
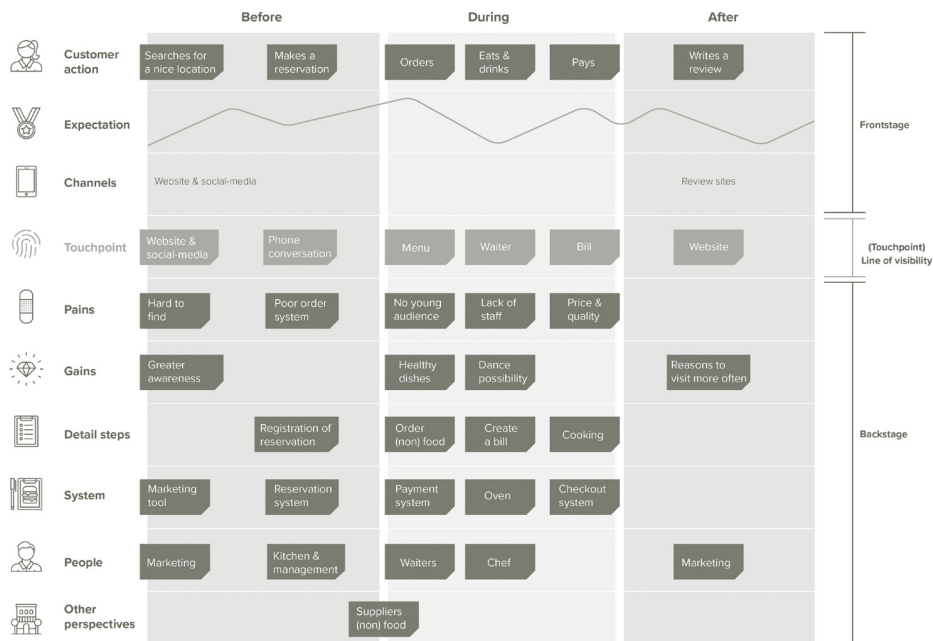
Steps 2 and 3 (*Research and Define*) are jointly focused on identifying the core problem and/or the challenges. We ensure that we identify and understand the correct problem, so we can find an effective way of resolving it.

Steps 4 and 5 (*Ideate and Validate*) together ensure that the appropriate solution is found and validated.

Once the five steps are completed, this is followed by a stage in which the solution is created and implemented. The likelihood of success during the Delivery stage increases significantly once these first five steps have been completed.

3.1 Journey Tools

To help you get started with people-based marketing in a practical way, we will explain part of the "Define" stage. We use two templates in order to learn more about the needs and requirements during the various stages of the customer journey: Persona Canvas and Blueprint. Complete these templates, based on all the information you have collected on the consumer at that point. This enables you to clearly identify what happens before, during and after interaction with the organization, along with the channels and touchpoints. Next, we also identify what data from the next chapter ("Available") plays a role at what time, i.e., what data is and isn't available. We also need to specify what we would like to collect in order to make the interaction more relevant in *owned* campaigns and advertising.[18]

		Before		During			After		
Customer action		Searches for a nice location	Makes a reservation	Orders	Eats & drinks	Pays	Writes a review		Frontstage
Expectation									
Channels		Website & social-media					Review sites		
Touchpoint		Website & social-media	Phone conversation	Menu	Waiter	Bill	Website		(Touchpoint) Line of visibility
Pains		Hard to find	Poor order system	No young audience	Lack of staff	Price & quality			
Gains		Greater awareness		Healthy dishes	Dance possibility		Reasons to visit more often		
Detail steps			Registration of reservation	Order (non) food	Create a bill	Cooking			Backstage
System		Marketing tool	Reservation system	Payment system	Oven	Checkout system			
People		Marketing	Kitchen & management	Waiters	Chef		Marketing		
Other perspectives			Suppliers (non) food						

The Blueprint canvas provides insight into the interrelationship between front-stage and back-stage processes, opportunities and areas for improvement (pains and gains). In this example, we use a restaurant.

Persona template

4. Available: What Customer Data Do You Need?

The first chapter clarifies the importance of people-based marketing to both customers and the organization. In order to ensure a relevant connection, organizations must also decide what types of customer data are required and how internal processes should be organized. This chapter takes an in-depth look at the various types of customer data and the use of this data.

4.1 Types of Data

The various types of data can be divided as follows:

- **First-party data:** This refers to data owned by your own organization and sourced from your own customer base. Since you have built, and manage, this data yourself, these are the most reliable and valuable data for an organization.
- **Second-party data:** This represents the shared first-party data from one or more third parties which could potentially add value. This data is often obtained by exchanging data with a non-competing organization, thereby increasing scale size.
- **Third-party data:** This type of data tends to be provided by parties that have no direct relationship with the customer and tend to be based on behavior rather than on information provided by (an) actual customer(s). This data enables you to create customer profiles based on behavioral patterns. The quality of this data tends to be lower than first-party or second-party data, although the scale of the data is much larger.

The diagram below shows the properties of the three types of data sources.

Type of data	Quality	Reliability	Costs	Scale size
First-party data:	****	*****	€	**
Second-party data	***	****	€€	***
Third-party data	**	**	€€€€€	*****

Different types of data

4.2 Data Sources and Collection
In order to categorize the multitude of data and source types, it is useful to subdivide these types of data into four groups: *Identity*, *Behavior*, *Social* and *Panel*. Data from each of these groups is needed in order to enter into a relevant relationship with the customer, since the availability of this data allows you to obtain a 360-degree customer view.

Identity data This data provides an answer to the question of who a customer really is, i.e., their identity. This might include demographic/socio-demographic and economic data, along with email addresses and name and address details.	**Social data** This data consists of information customers share about themselves on social media and elsewhere, or the experiences they share in reviews, including data customers share personally with the organization (first-party data).
Behavior data The data sources belonging to this group provide an answer to the question of how consumers behave. This involves recording and analyzing behavior (often using cookies) in order to glean new insights. Examples: website analyses based on search behavior, relevant pages/products based on clicks and what channels (online and offline) customers use to make purchases.	**Panel data** This refers to information customers share about themselves; this information is gained (for example) through panel sessions, focus groups and surveys. This also includes brand tracking.

4.3 Where Is Your Organization Now and Where Can You Be Headed?
Now that we've established which types of data are important when building relevant customer relationships, we need to determine to what extent your organization is able to make this data available, and what steps need to be taken next. We have developed a PIE scorecard for this purpose. By assessing data and data sources previously made available, we can determine to what extent your organization possesses data that can be used to optimize customer relationships.

How does the PIE scorecard work?

Step 1: For each of the data groups, enter the data sources previously made available within your organization.

Step 2: For each source, enter a score from 1 to 5 in the "Potential," "Impact," and "Ease" columns, with 1 representing "very low" and 5 representing "very high."

Step 3: Add up the scores for each data source. The higher the score, the more relevant the data and the closer the organization comes to the customer and therefore to the core of people-based marketing.

In addition to assessing the data previously made available, these steps can also be completed using data sources that have not yet been made available. Based on the outcome, it can be determined what data source is most relevant to the organization and must therefore be made available first.

Group	Data source	Potential	Impact	Ease	Sum
Identity					
Social					
Behavior					
Panel					
Total					

PIE scorecard

4.4 From Checklist to Analysis

By plotting the data sources that are already available into the BIPS model based on the scores attained, you gain insight into what extent your organization has data available that could be of value when entering into a relevant customer relationship. Since the Identity, Social, Behavior, and Panel groups have each been placed in a quadrant, you can immediately see which data groups are represented, but especially whether data sources from one of the groups is underrepresented. The next step is to fill the various gaps. By plotting potential, not yet available data sources into the model based on the score, you can learn which data sources should be assigned the highest level of priority. Obviously, this may vary depending on the organization.
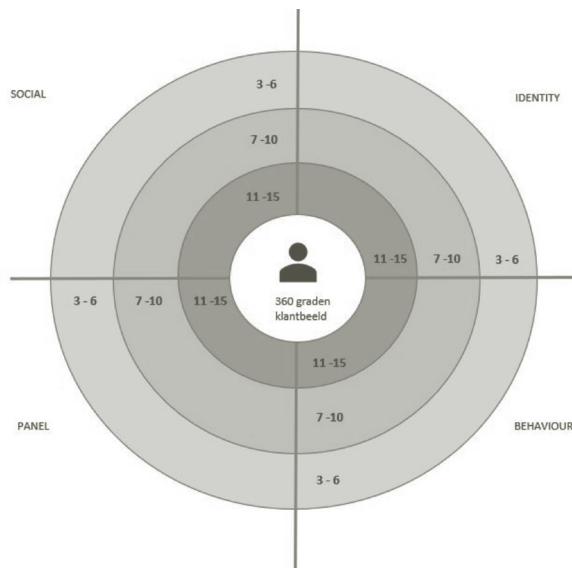
BIPS Model

4.5 The Organization's Maturity for People-Based Marketing

If you take the insights discussed in the various chapters and apply them to the organization, your organization can assess where you stand with the "People-based Maturity Model." To get this exactly right, we recommend that you find a specialized partner who can provide a detailed insight through an assessment.
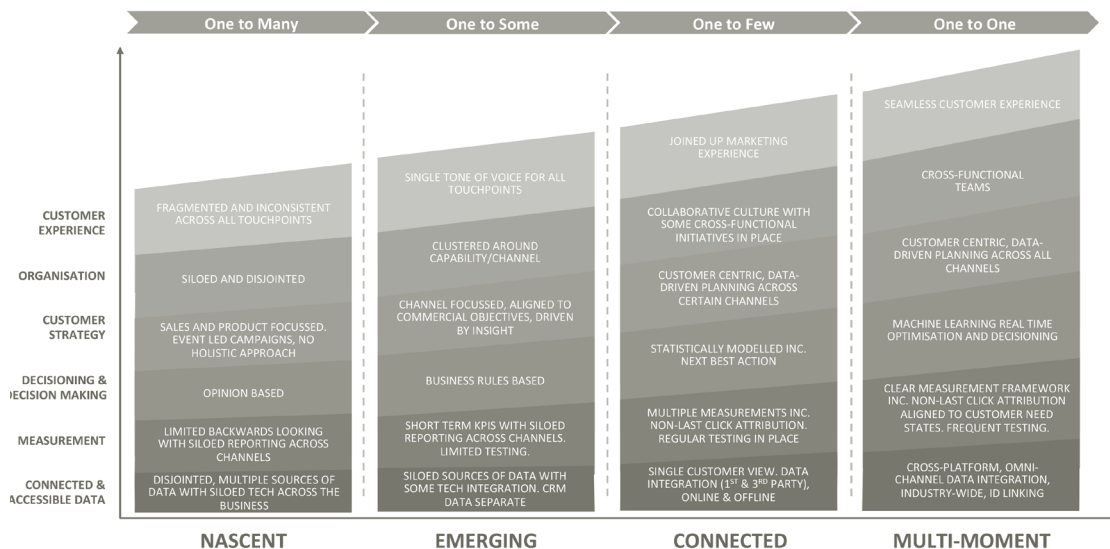
Working with a small team of people from your organization, determine at what stage of the six elements you find yourself – you will find that this is half the battle. Next, you can create a roadmap that facilitates growth.

	One to Many	One to Some	One to Few	One to One
			SEAMLESS CUSTOMER EXPERIENCE	
			JOINED UP MARKETING EXPERIENCE	
		SINGLE TONE OF VOICE FOR ALL TOUCHPOINTS		CROSS-FUNCTIONAL TEAMS
CUSTOMER EXPERIENCE	FRAGMENTED AND INCONSISTENT ACROSS ALL TOUCHPOINTS		COLLABORATIVE CULTURE WITH SOME CROSS-FUNCTIONAL INITIATIVES IN PLACE	
		CLUSTERED AROUND CAPABILITY/CHANNEL		CUSTOMER CENTRIC, DATA-DRIVEN PLANNING ACROSS ALL CHANNELS
ORGANISATION	SILOED AND DISJOINTED		CUSTOMER CENTRIC, DATA-DRIVEN PLANNING ACROSS CERTAIN CHANNELS	
		CHANNEL FOCUSSED, ALIGNED TO COMMERCIAL OBJECTIVES, DRIVEN BY INSIGHT		
CUSTOMER STRATEGY	SALES AND PRODUCT FOCUSSED, EVENT LED CAMPAIGNS, NO HOLISTIC APPROACH			MACHINE LEARNING REAL TIME OPTIMISATION AND DECISIONING
			STATISTICALLY MODELLED INC. NEXT BEST ACTION	
DECISIONING & DECISION MAKING	OPINION BASED	BUSINESS RULES BASED		CLEAR MEASUREMENT FRAMEWORK INC. NON-LAST CLICK ATTRIBUTION ALIGNED TO CUSTOMER NEED STATES. FREQUENT TESTING.
			MULTIPLE MEASUREMENTS INC. NON-LAST CLICK ATTRIBUTION. REGULAR TESTING IN PLACE	
MEASUREMENT	LIMITED BACKWARDS LOOKING WITH SILOED REPORTING ACROSS CHANNELS	SHORT TERM KPIS WITH SILOED REPORTING ACROSS CHANNELS. LIMITED TESTING.		
CONNECTED & ACCESSIBLE DATA	DISJOINTED, MULTIPLE SOURCES OF DATA WITH SILOED TECH ACROSS THE BUSINESS	SILOED SOURCES OF DATA WITH SOME TECH INTEGRATION. CRM DATA SEPARATE	SINGLE CUSTOMER VIEW. DATA INTEGRATION (1ST & 3RD PARTY), ONLINE & OFFLINE	CROSS-PLATFORM, OMNI-CHANNEL DATA INTEGRATION, INDUSTRY-WIDE, ID LINKING
	NASCENT	**EMERGING**	**CONNECTED**	**MULTI-MOMENT**

The People-Based Maturity Model

5. Conclusion

The challenges facing organizations – specifically in the retail industry – require that you use the customer as a point of departure. What matters is relevance across the entire customer journey; this relevance can be achieved by using the elements of the 6R model as a basis and asking yourself whether you can adequately implement these for the consumer. If you would like to make the transition to customer-centric business, customer intimacy is an obvious value strategy; people-based marketing is based on this. In addition to involving external partners, a successful transition also requires organization-wide support among all departments. Ultimately, it is the employees who facilitate change in an organization, rather than the other way around. In order to ensure a relevant connection, an organization must decide what types of customer data are required. You can do this based on different types of customer data through the BIPS model and the use of this data.

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