SDL Connect 2017

Technical Strategy for your Customer Experience

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About me

- Worked in Web for almost 20 years
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About Content Bloom

- Content Management
    - SDL Tridion / Web
    - SDL Knowledge Center
    - Acquia
    - Adobe AEM
    - Sitecore

- Digital Marketing
    - Strategy & Execution
    - Creative, UX, Content creation

- Development
    - Java, .Net, PHP
    - HTML, JS, CSS
    - Desktop Applications
    - Native Phone Apps

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My introduction to CXM

About 6 years ago

A client came to us…….

"Hey we've had SDL's Personalization tools for a while, we'd like to build something!"

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About the client

- Training and professional education
- Located in Europe and Asia
- Huge online repository of e-books, cases, training materials
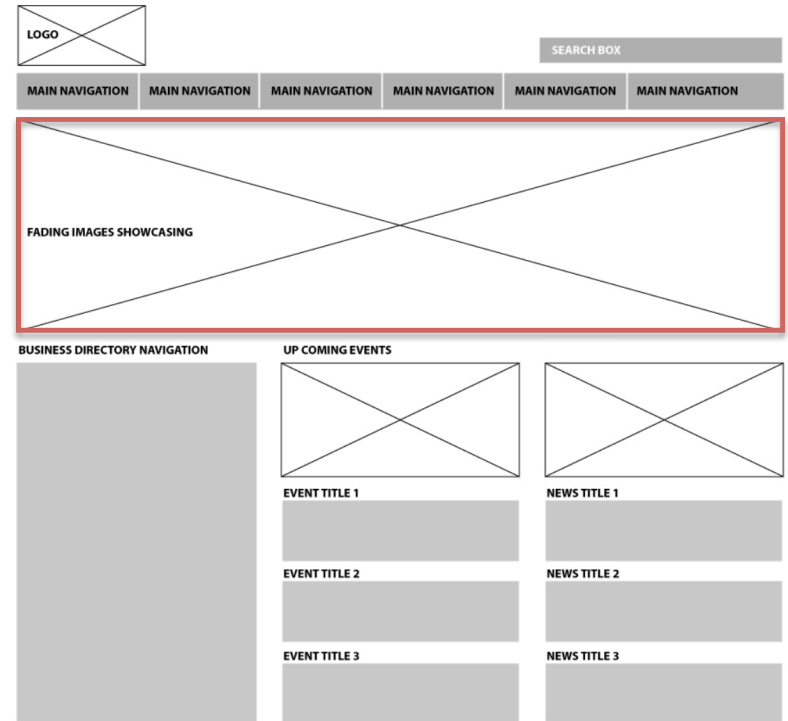- Sells access to content and online training sessions

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So what did we do?

Business requirements

We sat down and decided on way forward:

1. We'll do a simple implementation to update some of the website's banners
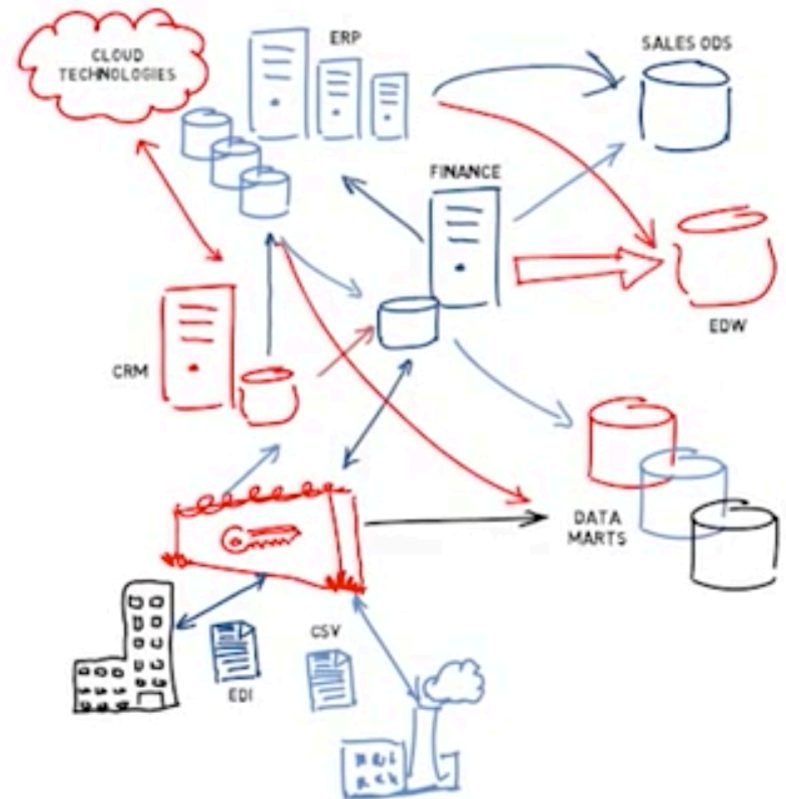
2. We reviewed customer types and identified personas

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Technology

- Data was everywhere:

  – Multiple customer databases
  – Online forms generated emails
  – Spreadsheets

What we were building was quite simple, but we wanted to ensure it could grow and scale as the business had new requirements

We got together and made a plan!

Collectively we mapped out:

- Ownership
- Functionality
- Implementation effort
- Training

We fed all of this into a plan.

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Data Hub

We built a data hub as a central place to get and update data from the various sources in the business.

Implementation

- SDL's XO
- SDL's Context Engine
- Data cartridges
- Communication layers to the Data Hub
- CMS Design and Template updates

We got it working!

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Training

- We got the teams together and trained them how to use their new tools

- Here it really clicked !

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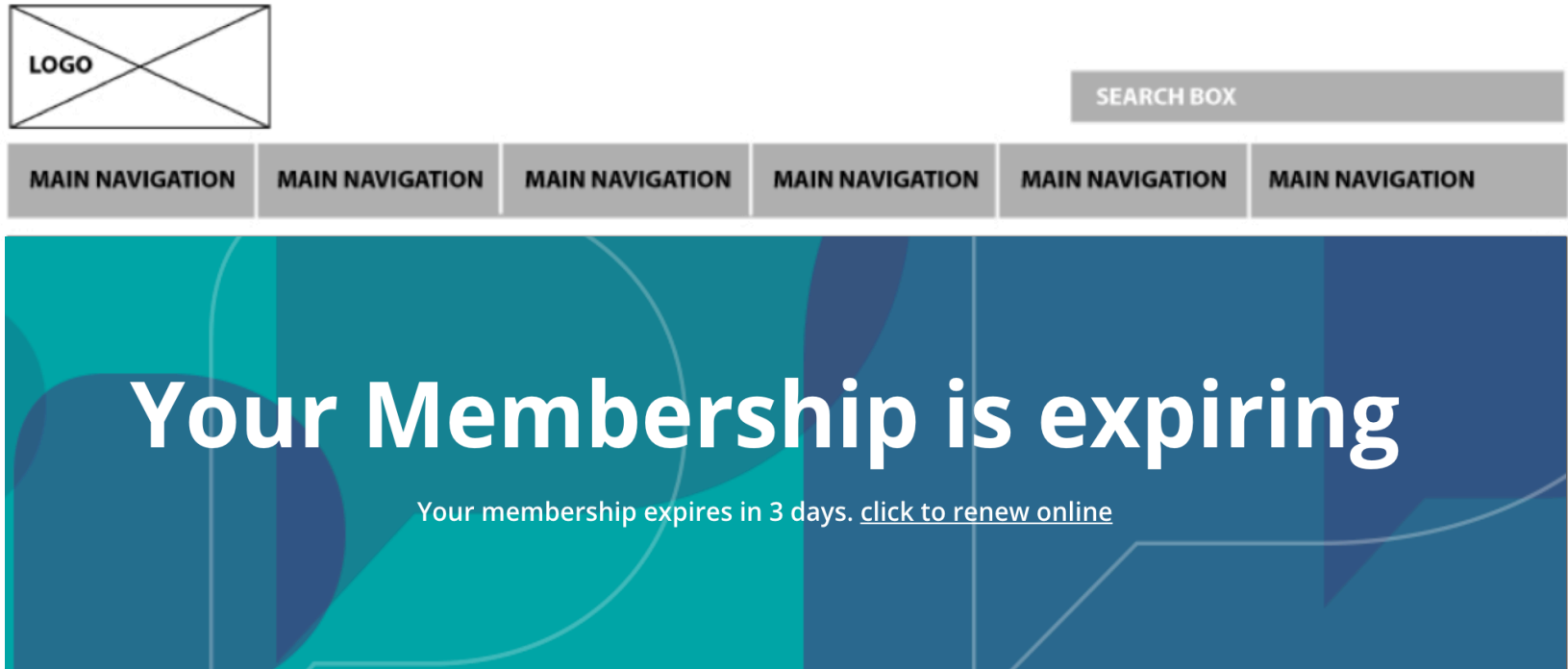
The first production use

Happy Birthday to our CEO !

The second production use

Online Subscription Renewal

The next 6 years

Technical Strategy for CXM

- Internal Capabilities
- External factors
  - Legal, Social, Competition, Political
- Opportunities
- Threats
  - What can stop us achieving our goal
- Structure and Governance
- Milestones & Goals

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Lessons Learnt

Start small

- Use OOTB functionality
- Simple BRD docs
- Small project costs
- Quick wins
- Operationalize the new software tools

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Legacy technology

- Can make it hard to implement new CX technology.

- Is the current platform near it's end of life?

- Can the implementation be used as is after a technology upgrade?

- Would the features need to be rebuilt in the future?

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Data protection

- Some solutions send user data 'over the wire'
- Ensure user data isn't obtainable in the client device
- Storing data in third party solutions

Roles, Governance & Communication

- Clearly identify roles and owners
  - A content editor is often not the person creating campaigns in the CMS
- Tech, Marketing must work closely together and meet often

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Experiment

- Keep experimenting to better understand:
  - Your audience
  - Technology limitations
  - Performance
  - Feed into future planning

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Thank you!