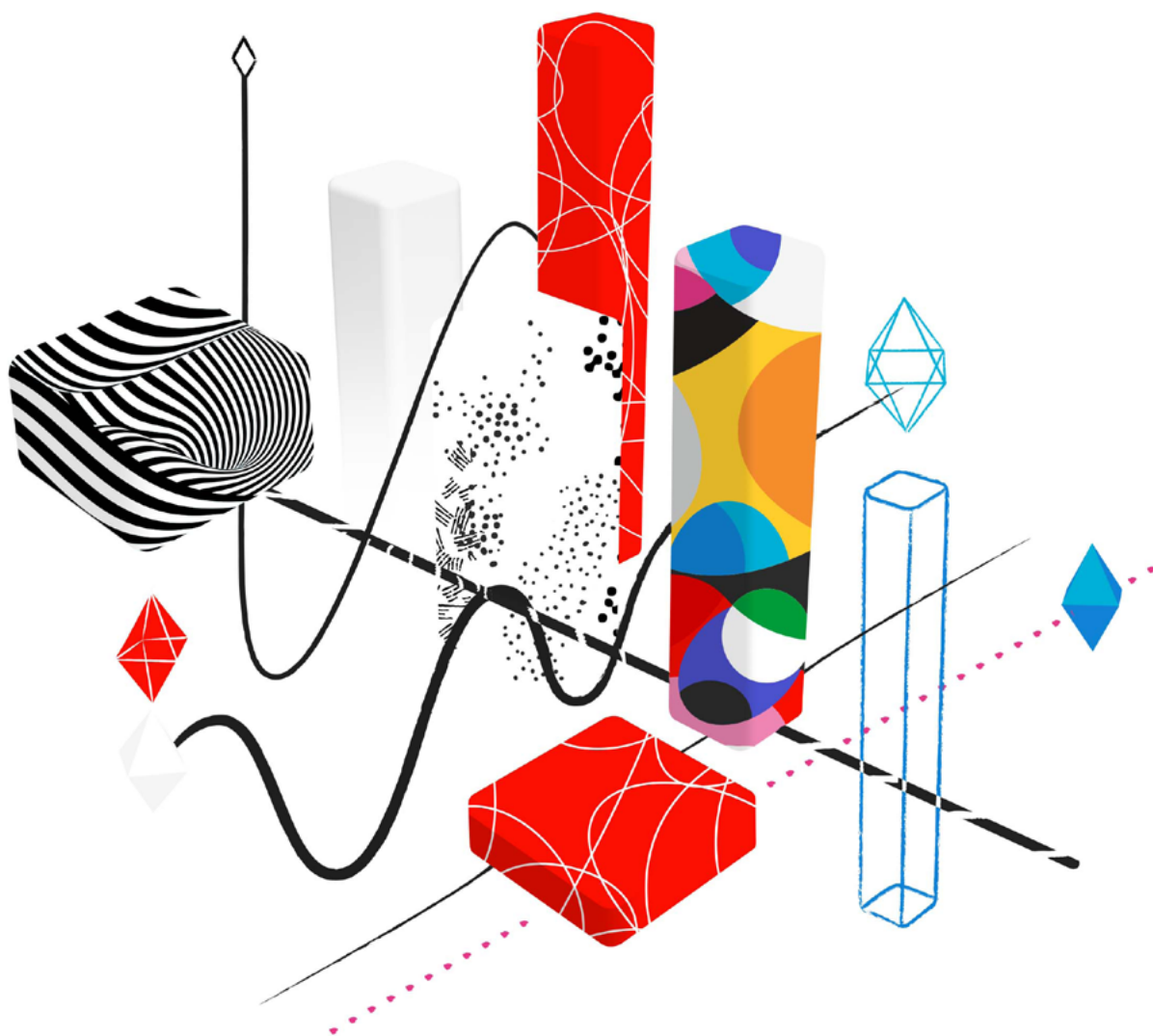




Towards Great Customer Experiences: A CIO Tech Assessment Checklist for Digital Transformation

Unify data, create agile content, operate across channels and personalise for optimal impact

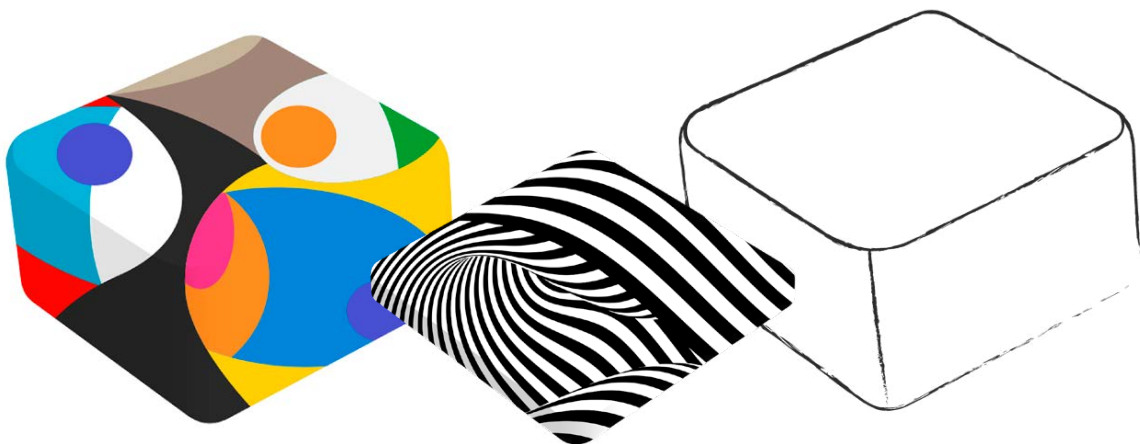


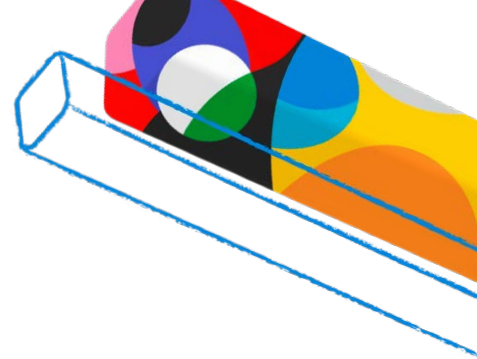
Introduction

The road to successful, ongoing digital transformation is not so much long as never-ending. Organisations must constantly evolve and optimise their positions to address opportunities, defend against competitors, and meet the requirements of regulators and security threats.

Transformation is a complex process that involves the whole organisation and putting the customer experience at the heart of transformation is a way to prioritise tasks and focus. But change agents must also achieve an equilibrium between cost, quality and speed of action.

In this short document we offer a checklist and a starting point to think about how to manage digital and data strategies that inspire great customer experiences while combining strong operations with opportunities to change, innovate, and progress.





Get Your Data House in Order

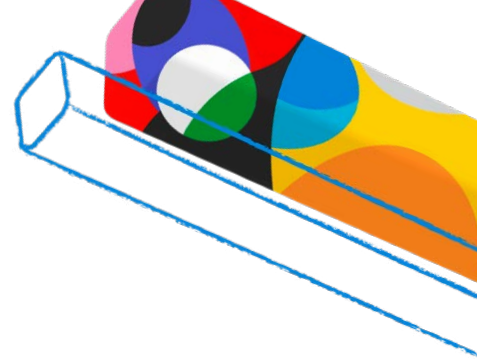
If you're building a house, you need foundations. Corraling data that sits across hardware platforms, operating systems, legacy systems, applications, and versions forms the underpinnings of successful transformation. Organisations need data that is clean, reliable, auditable, cohesive, in context, timely, and can be quickly activated to support real-time decisioning.

Maintaining strong customer data is fundamental in order to create systems of record but also to engage with customers and build a platform for insights. Understand the customer and strategy and actions will fall into place. Seek systems that are open and allow customer profiles to be automatically updated so targeted content and offers hit the mark.

Common mistakes include outsourcing the challenge to a third party that is unfamiliar with the environment. Don't take short-term actions that leave a mess for successors and be careful creating offers or brands that are disconnected from the valuable data you're sitting on. And also take care with 'lift and shift' data migrations from platform to platform that risk damage to core data assets.

Better to address root causes, mapping your data challenges holistically and pursuing a coherent data architecture. Look at importing data from external sources and making it more easily understood by XDMs that help to develop a fabric where data can be accessed on an as-a-service basis. Companies can then create real-time customer profiles, activating them across devices with identity graphs that help you to know the person using the device and support automated data collection.





Simplify Your MarTech Stack

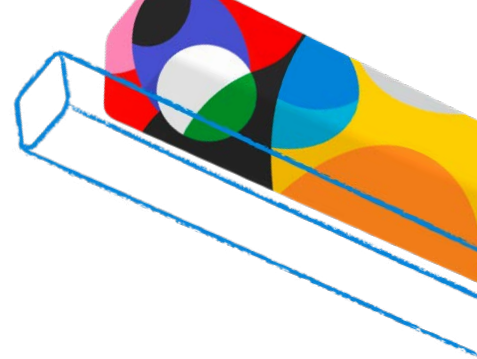
The system of record is an essential tool for keeping tabs on customer interactions but it needs to be bolstered by a broader understanding of who buyers are, what activities trigger them to purchase, how they are likely to react to content, and what should be done to provide a greater product and service experience.

Here, the marketing technology stack has a huge role to play, creating ways to automate and optimise marketing spend and feed sales engines. But beware of data silos and patchwork point solutions. The key is to have a federated approach where data is a shared service in a hub with spokes to self-service, chatbots, customer orchestration, the middle office, and back office. Seamlessness is the objective with a single golden customer record so that customers (and employees and partners) can move easily across channels and their movements and interactions can be rapidly analysed and understood.

The CIO must work in tandem with the CMO to select and optimise the MarTech stack and lead the way on developing workflows and integrations and getting the most from emerging waves such as AI and Machine Learning.

Personalise Experiences With Content

Creating focused, powerful content will gain traction with customers and, with tracking, help you understand their preferences and turn-offs. Personalise experiences wherever possible and don't have your brand tarnished by spam or scattergun approaches. Governance, data lineage and policies are critical here. Use content that is unique and crafted by experts in their fields. Ensure content is tagged and easily accessible for reuse and adaptation.



Think Cloud

Most organisations have made some sort of commitment to cloud technologies but they are divided between those that are all in, those that are tactically vested and those that are tentatively deploying or piloting.

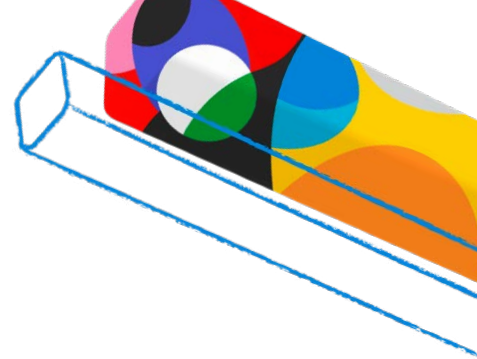
For the customer experience, cloud is an attractive way to integrate systems and plug in external data sources that augment customer profiles and drive compelling experiences.

Don't see cloud as a universal panacea though. The world will be hybrid for many years to come, hence the appeal of halfway-house approaches such as AWS Outpost, Microsoft Azure Stack, and Google Anthos.

Build in Security, Privacy & Compliance

Security and compliance concerns are at the top or near the top of CIO and CISO concerns. The threat landscape is now so wide that organisations need to constantly monitor to protect themselves against a wide range of threats, including attempts to customer and employee data.

Work with compliance and legal colleagues on changing rules and the impacts of foreign legislation such as the US Cloud Act, but don't get tied up in knots or become fearful of change. There has to be a balance between managing data sensibly (using role-based access and granular permissions) but without constraining the business unduly.



Manage vendors smarter

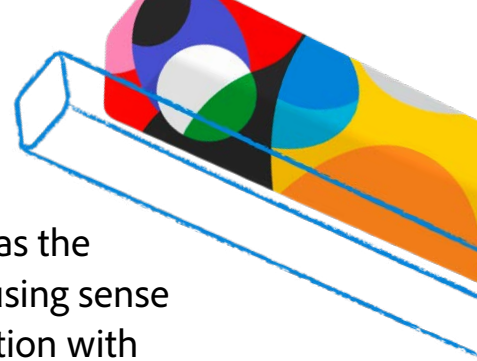
Don't obsess over lowest cost or be a Scrooge as penny-pinching will hurt potential. Beware of Shadow IT: having departments acting in isolation is a threat to unlocking value and gaining greater understanding of customer needs and desires. Here, the CIO must be gatekeeper, service provider and integrator, and chief overseer. Encourage lines of business to work more closely together by having CIOs, CMOs, and others sit together on executive committees and steering committees. As with politics, business transformation success is the art of compromise so prioritise high-impact changes. Identify roadblocks early (for example, actions that may raise red flags for security and governance) and address them to move at pace and win over doubters.

The Golden Triumvirate: People, Process & Technology

Bringing together people, processes, and technology tools will act as a glue to bond successful change and great customer experiences. Technology can't provide silver bullets: it's an enabler, so think about soft issues. The ADKAR 12-step change model can help. Maintain Awareness, Desire, Knowledge, Ability, and Reinforcement to keep on track and communicate (and listen) throughout process change. Consider whether you have the right roles and the candidates for those roles to avoid duplication or round peg/square hole issues for a leaner RevOps model where people know their roles and can fulfil them optimally.

Finally, if the transformation project appears daunting then break tasks down, for example to department level, to jump to the quick wins that can act as templates and learning experiences. Transformation can't slow down the organisation: it has to be part

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of a bi-modal model where the wheels keep turning as the engine is upgraded. Nobody said this is easy, but by using sense and experience, the power of sustainable transformation with the customer experience at its heart can be unleashed.

Roles and Responsibilities

Any successful plan will need to accommodate the profiles of various personas. Understanding their motivations and skill sets will drive digital/data transformation success.

Role	Relevant responsibility	Transformation contribution
CEO	Value growth	Lead change
COO	Run business operations optimally, build resilience assurance, manage technical debt	Advise on operational needs
CMO	Lead marketing and advertising initiatives	Lead and work with peers on integrated martech stack development
CIO	Lead the enterprise technology stack and support innovation	Act as service provider to internal leaders
CTO	Support CIO by using modernised tech to enable business succes	Work with Chief Architect so standards are implemented and integration is smooth
Chief Data Officer	Specialise in making best use of data	Ensure data is collected in a timely, context-sensitive manner and ready for analytics
Chief Digital Officer	Specialise in digital-centric actions	Support others with domain knowledge and ideas to spark digitally enabled success
CISO	Responsible for data security and governance	Ensure that actions don't significantly introduce risks, or lead to non-compliance
Chief Architect	Work with CTO and others to maintain a strong data fabric	Act as gatekeeper for standards compliance, integration and portfolio management



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