Picture-perfect customer profiles.

Zooming in on personalized experiences.

Photographers know the importance of connecting with the people they photograph. Earn their trust and your photos are more authentic. Do the opposite and it's just another posed snapshot.

As marketers, making the same kinds of meaningful connections with buyers can mean the difference between keeping customers loyal and losing them to competitors. That's why having a deep understanding of your customer is so important. With a complete customer view, you can generate and act on real-time insights to deliver connected, personalized experiences that build consumer trust.

> " It's more important to click with people than to click the shutter."
>
> **Alfred Eisenstaedt**
> Photographer

Bringing your customer into focus.

Rising consumer expectations, increasing regulations, data privacy, and a trail of crumbling cookies. Both B2C and B2B companies face a bumpy road ahead as they work to deliver personalization and outstanding customer experiences. While consumers want companies to know who they are and what they need, they also expect you to use their data responsibly. Making sense of this data and all the different ways consumers interact with your business isn't easy. A unified customer data profile can show you the way.

In this eBook, you'll learn about:

- The difference between a customer profile and a buyer persona.
- The biggest obstacles to providing personalized experiences.
- How to create your own customer profiles.
- The main components of a unified customer profile.
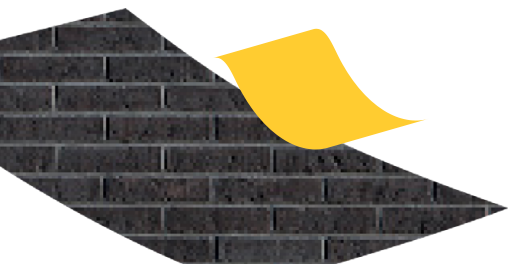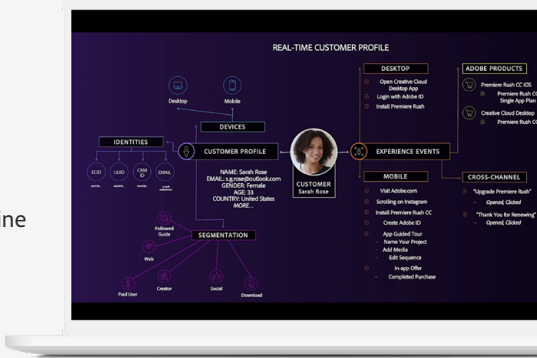
What a customer profile is—and isn't.
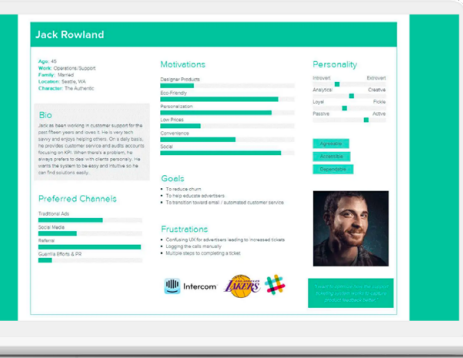
Buyer Persona

Includes your best buyers' demographics, interests, challenges, goals, buyer objections, and information preferences.

Customer Profile

Combines real-life demographics and behavioral data like online and offline interactions.

While buyer personas and customer profiles both provide information about your customer, they have different purposes and use different data. A buyer persona is a semi-fictional representation of your ideal customer or buyer group. It helps you better understand how to interact with your target audience and can be used to inform sophisticated segmentations of your customer profiles—as long as your profiles are strong and complete.

Customer profiles represent a real person and contain the demographic and behavioral data you have about them. These profiles help you nurture leads with the most relevant messages in real time and convert those leads into paying customers over the lifetime of their engagement with the business.

> " Until now, we've only personalized based on segment attributes, but never a true understanding of the person. This is where a customer data platform (CDP) comes in. CDPs can help you link up point conversations across channels over time, allowing you to develop a really deep relationship with the customer."
>
> **Steve Allison**
> Head of Audience & Data Technologies,
> International PMM Group, Adobe

With real-time profiles, you can better connect with your audience by putting people's activities in context. For example, one person could be both a B2B buyer in their job and a B2C shopper for personal items. A single, unified profile can help you understand how to best engage with that person depending on the actions they take.
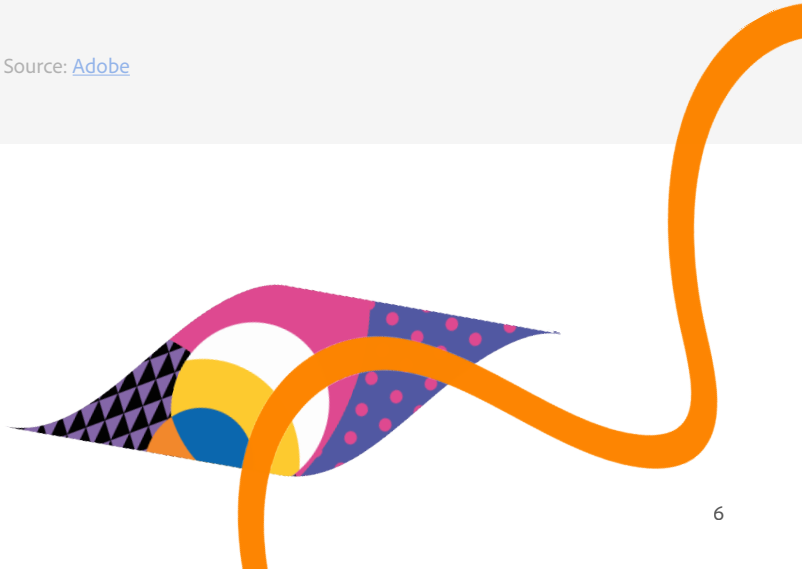
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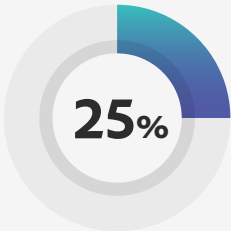
Only one in four organizations say they have single customer data profiles.

60%
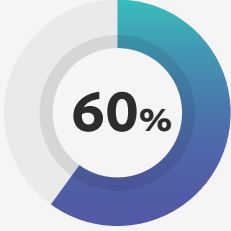
60% plan to have them within the next 18 months.

Source: Adobe

Scattered data, broken experiences.

While a unified customer profile is the cornerstone of your competitive edge, there are some common setbacks most organizations face as they place a close-up lens on their customer.

- **Fragmented data and silos.**
  Most organizations store data about their customers in separate, disconnected systems—customer relationship management (CRM) interactions, point of sale (POS) activities, web analytic logs, and loyalty card interactions. Much of this data is proprietary to the system vendor and incompatible with other systems, making it difficult to share information. Without a complete picture of your customer, you may inadvertently end up advertising to customers who already purchased the product you're promoting.

- **Lack of data governance.**
  In order to responsibly manage sensitive customer data, not only will you have to comply with organizational policies, but also with regional policies like General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA). But without a centralized way to manage that data, or guardrails to ensure compliance, the risk of data misuse, breaches, and loss of customer trust increases.

- **Loss of third-party cookies.**
  For years, organizations relied on data management platforms (DMP) to collect third-party cookies to track users across websites and serve up more relevant ads and offers. But privacy concerns and Google's announcement that cookies will be phased out by late 2023 mean the tides are shifting, with first- and second-party data rising to the top. Zero-party data—information that you request from consumers when they sign up for an account—will also be a key component of your data strategy.

A CDP collects all your data into one place, allowing you to put together those fragments so you can immediately access them for real-time personalization or next-best actions. With your data consolidated, you can activate it faster, creating more connected customer conversations. By mapping consent to the data model you're creating, you can make it easier to use and share that data in the future according to the original permission given by the customer.

> " In many ways, a CDP has become a real brand differentiator because it helps you build trust with consumers."
>
> **Steve Allison**
> Head of Audience & Data Technologies
> International PMM Group, Adobe

Four steps to develop actionable customer profiles.

1. **Capture real-time online customer data.**
   From email and websites to virtual events and social posts, real-time data from online activity provides you with context about what your customers are doing at this very moment. Imagine someone is interested in buying a car. They visit a car review page, followed by a finance calculator.

   By collecting data points such as device type, time on page, pages visited before and after, location, sentiment analysis, and even attribution, you can determine the best ad or offer to display to that consumer at that very moment. That's the power of real-time data capture.

2. **Synchronize offline customer data.**
   Because online data only tells part of the story, it's important to consider offline interactions too, including those from direct mail campaigns, brick and mortar stores, and in-person events. For example, if someone makes an in-store purchase with their loyalty card, you should be able to see what they bought and the product value.

   With that information, you can send coupons based on past purchases, or determine whether or not their customer lifetime value has increased, bumping their loyalty tier up or down as needed.

3. **Mix in mobile data.**
   "One of the unique things about mobile is that you almost always
   know exactly who that person is, so your ability to react in real
   time is vastly improved," says Allison. By collecting data around
   app installs, logins, user account preferences, time in app, push
   notification engagement, location, and even weather, you can
   provide contextual experiences that delight your customers.

   For example, as a traveler is walking through the airport, you
   can send location notifications providing a voucher to spend in
   the duty-free shop they're about to pass, or for a free latte in the
   cafe across the way. Mobile apps allow you to provide real-time
   interaction, which makes them an important and attractive part
   of the engagement process.

4. **Uncover insights faster with machine learning.**
   With so much customer data streaming in every second from
   different locations and devices, you're going to need help keeping
   up with it all. Not only can machine learning help you respond
   quickly with a free latte coupon as that customer passes the
   coffee shop, but it can also calculate whether or not that customer
   is worth issuing the discount.

   For example, by taking in customer data for analysis based on
   your business objectives, AI can make calculations around that
   customer's propensity to spend more in the future or churn to
   a competitor.

Panera
BREAD®

## Tasty experiences, without the friction.

Customers don't stop interacting with Panera Bread after they leave the restaurant. They also communicate with the brand through their website, mobile app, and 40 million-member loyalty program. To better understand and use customer data, as well as personalize at scale, Panera Bread is working with Adobe Real-time CDP, part of the Adobe Experience Platform. This helps streamline how customers re-order food and choose pickup options, while ensuring that the brand presents customers with the most relevant offers.

"

Our digital strategy is focused on making great food accessible to all, removing any friction in the Panera experience, and keeping customers coming back."

George Hanson
SVP and Chief Digital Officer, Panera Bread

Components of a unified customer profile.
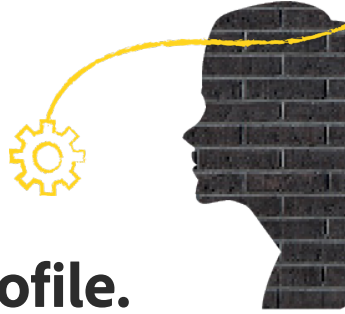
From people to processes to technology, there are four core elements you need to get started with your own customer profiles.

1. **Your data sources.**
   The foundation of your customer profile is the data you've collected about your customers across the organization. Whether zero-party data from account signups, first-party data you gather from web, mobile, and offline interactions, or second-party data you share with partners, it has to be clean, flexible, standardized, and easily accessible for real-time experiences.

   Open source data models like XDM—the extensible experience data model—normalize and standardize data while also providing a way to store metadata about consent. And with clean data, machine learning is better, faster, and more effective.

   "With XDM, you simplify the work of your machine learning team and data scientists," Allison explains. "Because the data is standardized and the identity already stored, all they have to do is run an algorithm for it."

2. **A customer data platform (CDP).**
   A CDP works with anonymous and known individuals and can stitch together personally identifiable information (PII) such as names, street addresses, phone numbers, and email addresses

across all your data. This known data can come from your CRM, point of sale system, phone communications system, or any other business system that collects data.

While pseudonymous data (first-, second-, and third-party data) provides you with context, CRM and business data give you information about identity that you can use to make better business decisions.

Stitching together identities.

With the help of an identity graph (ID graph), the CDP creates robust customer profiles across devices and interactions. The ID graph stores identifiers or profile fragments that correlate to customers, including username, email, phone, cookies, and offline identifiers like loyalty card numbers. This information comes from the various channels customers use to interact with your brand, such as web, mobile, email, or phone support. The ID graph then processes that data from across your marketing and business systems and stitches it into a single customer profile so you can better understand the type of content and offers to serve up.


Channels

Profile fragments

Stitch profiles using identity graph

Real-time customer profile
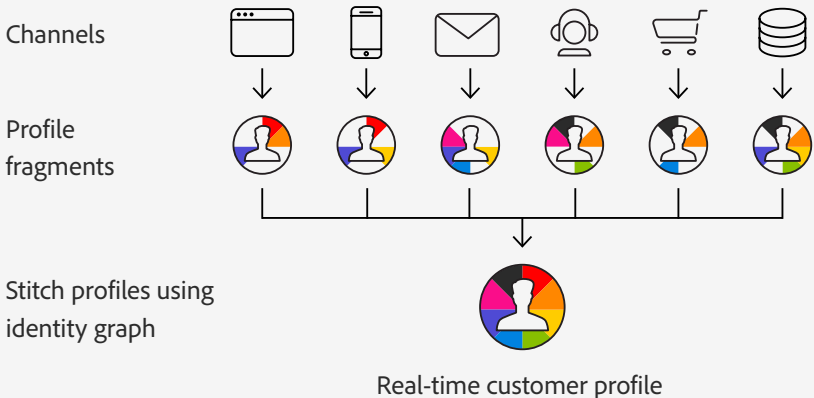
3. **Your team or Audience Center of Excellence (COE).**
"Creating a complete customer profile isn't a technology challenge," says Allison. "It's a business problem." That's why you need multidisciplinary teams or an Audience Center of Excellence in place to identify the data each department needs in order to improve their business processes—as well as someone with clout to lead the way.

These cross-functional teams—made up of CIOs, CMOs, departmental heads, data scientists, and legal representatives—work together to reconcile disparate data sets, develop segmentation strategy across teams, set enterprise Key Performance Indicators (KPIs), and create an activation roadmap.

4. **Your tech stack.**
While many CDPs were designed as point solutions for specific functions, a CDP that creates a unified customer profile provides value to the entire organization. Your technology should be scalable and robust enough to be an enterprise solution, and not just a departmental tool. With an enterprise solution, you can share customer profiles with any other business systems that need them in real time, extending the value of your existing technology investment.
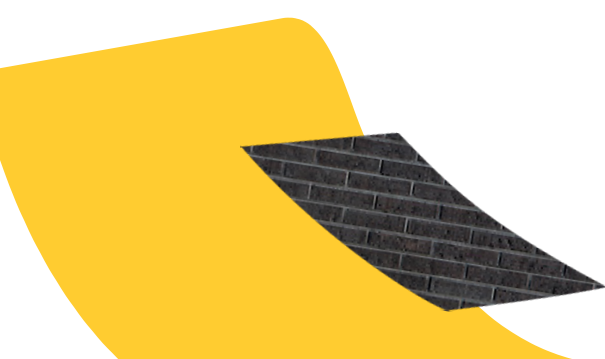
Visualizing real-world examples of real-time experiences.

Reaching customers who are most likely to buy.

Imagine you're a marketing manager for a large insurance company. You want to run more targeted campaigns for customers who are most likely to buy a policy, but you don't know enough about your customers to do so. You have plenty of customer data, but it's all housed in different systems, making it difficult to create more in-depth customer profiles.

How to create a deeper profile.

Identify your visitors' propensity scores or likelihood to purchase a policy. A CDP uses real-time machine learning to learn from your customers' past and present behavior—such as page views, product page views, add to cart, and offline POS transactions. All of this activity is used to create a propensity score, which then links to the customer's real-time profile. You can create customer segments based on propensity to either buy or churn, and use them in different channels for more targeted interactions and offers.

Boosting cross-sell and upsell in B2B accounts.

B2B accounts are particularly challenging when it comes to cross-selling and upselling your products. With different contacts in multiple lines of business, you never quite get a complete view of sales, interactions, and opportunities across the company. Which means you're more likely to send inconsistent messages and lose potential revenue.

How to create a deeper profile.

Get started by bringing together all of your contacts, purchases, and engagements from CRM, marketing automation, and other business systems for a complete view of your individual buyers and the entire account, down to the SKU level. Next, activate cross-sell rules and analyze interactions to see which contacts would be good targets. Automate nurture campaigns for those targets and refine with customer journey analytics.

Sharing customer data across the business.

EY, a leading B2B brand, knows all too well that personalization takes hard work—especially when engaging with clients and prospects across multiple channels. But with the help of Adobe Experience Platform, including Adobe Real-time CDP, their teams can see where each individual and account are on the buying journey, and can move them through the sales cycle in the most appropriate way.

In addition to the EY marketing teams, their sales teams also benefit. They can see which segments have already watched a webinar or consumed other marketing content, as well as which have given marketing consent. With a steady flow of information between both teams, they can better support each other and their customers by providing more relevant, memorable experiences.

See your customers in high resolution.

Soon to be out of the picture, cookies are a stale reminder of the old ways of communicating with your customers. For more valuable, data-driven personalization across channels, companies in all industries are adopting customer data platforms, and taking personalization to new heights with unified customer profiles.

"CDP isn't just data–it's the source of your governance, insight, and actionable truth," says Allison.

Data and a best-in-class CDP are your keys to maintaining a competitive advantage and providing great customer experiences at scale. Together, they can help you compose a vivid, more in-depth picture of every customer so the experiences you deliver are just as rich.

Learn more about building real-time people and account profiles to deliver personalized experiences across any channel.

Get details

Adobe can help.

Adobe Real-time Customer Data Platform uses the power of Adobe Experience Platform to create and activate real-time customer profiles from known and unknown customer data. With Adobe solutions, you can personalize experiences in the moment while keeping sensitive customer information safe and compliant.

Sources

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Steve Allison, Adobe, private interview, August 23, 2021.

Vinay Goel, "An Updated Timeline for Privacy Sandbox Milestones," Google, 2021.