The key success factors for choosing your Lead & Customer Identification Platform

Best-in-class lead & customer identification solutions are rapidly evolving and can be characterised by some key components.

Starting with the Customer Journey, it is necessary to identify the separate "dots" (events) a lead or customer makes, and connect them. Measuring all engagement allows Marketing to pass on (fully) qualified leads to Sales. The Big Data mechanisms that deliver this functionality utilise lead-scoring algorithms to identify any sequence of events that mean qualification, and signal this to the people in your organization who need to respond.

The two-part solution required moves past simple IP-to-company lookup to combine (GDPR compliant) identification of individuals and the ability to disseminate this activity throughout a modern Sales organisation.

The range of touchpoints which can be used to identify includes (but is not limited to) sign-ups, newsletters, ad campaigns, registrations, forms of any kind, and logins. And finally a robust solution delivers the ability to scale users and leads and integrate into sophisticated workflows because scenarios differ from company to company, meaning flexibility is required (API).

Here is a Summary of the key success factors we have identified:

1. Create a Single Customer View
2. Identify Companies AND persons
3. Control and Own your (Big) Data.
4. Keep it relevant, limit your options
5. Adapt the Solution to your Organisation, not vice versa
6. No Limits: open, accessible, let the data work for you

Introduction: 'connect the dots'

Successful marketing is responsive to customer journeys. The solution involves "connecting the dots" which means using software which makes customer journeys visible.

Currently, in B2B scenarios, customer and buyer journeys are conducted almost entirely online. Most of the journey has been completed before a potential customer even seeks contact with the seller. In spite of this, every company wants to identify potential customers as quickly as possible during the buyer and customer journey. The more complex the purchasing process, the more people are involved in this customer journey. Identifying and tracking as many events as possible by all people involved is critical for understanding and influencing this journey.

"Connecting the dots" applies specifically to B2B customer intelligence. In order to do this in a meaningful way, you need to identify and track as many of the "dots" (or data) as possible. These "dots", or events, are also known as touchpoints. Examples ar pageviews, downloads, mail read & opens, mail clicks, registrations, mailings, logins, traffic campaigns, etc. This is where the value of a B2B Big Data Analytics platform comes in. Powerful scoring algorithms allow marketers to be alerted to qualification patterns and "buy signals".

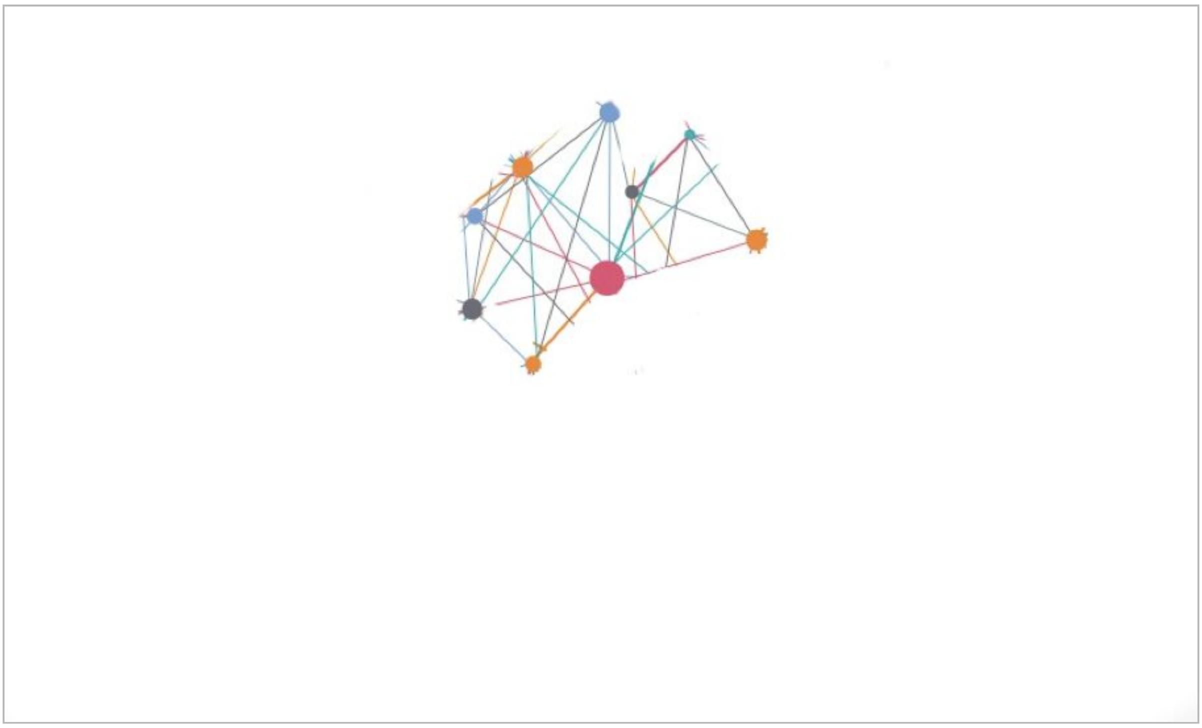
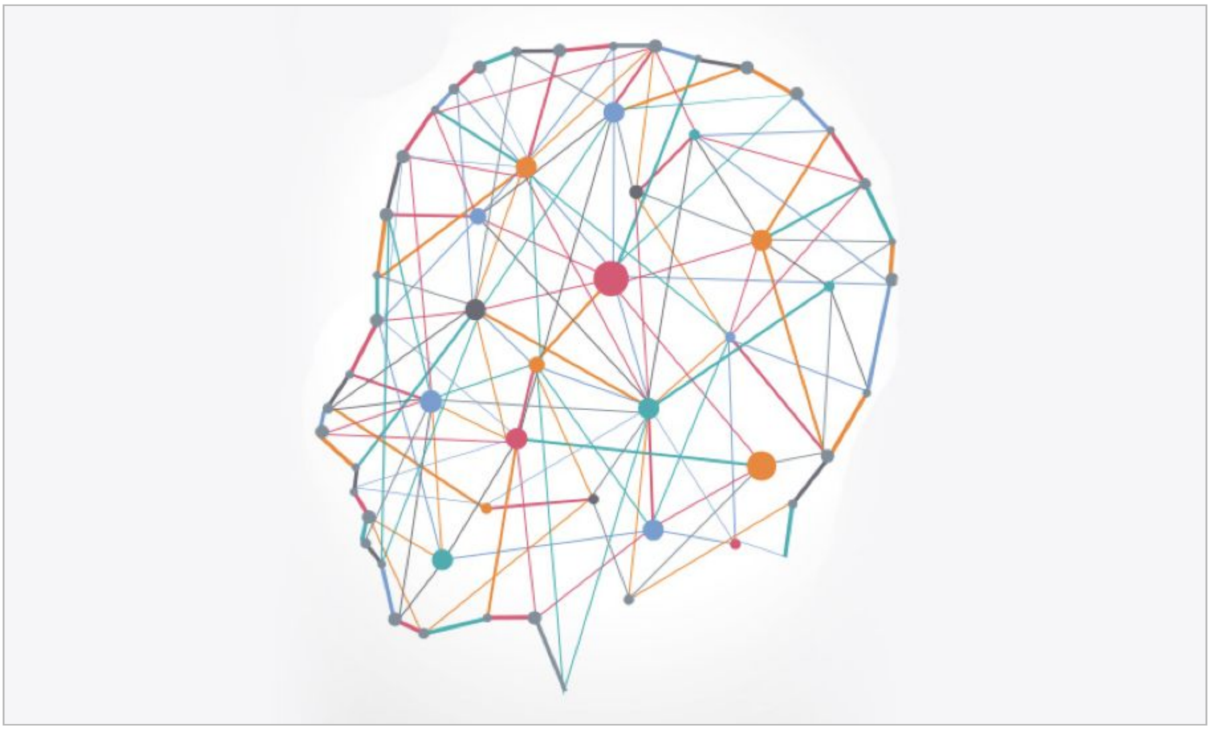


Figure 1: Customer profile with limited identification and behaviour

As Marketing manager, would you be confident to hand over the following incomplete "dots" to your Sales teams and explain them as a Sales-Qualified-Lead?

Or would you prefer to hand over a Sales-Qualified-Lead based on having connected "all the dots" as shown in the following image?



Your answer tells us why identifying and tracking as many "dots" as possible is Mission-Critical to your success.

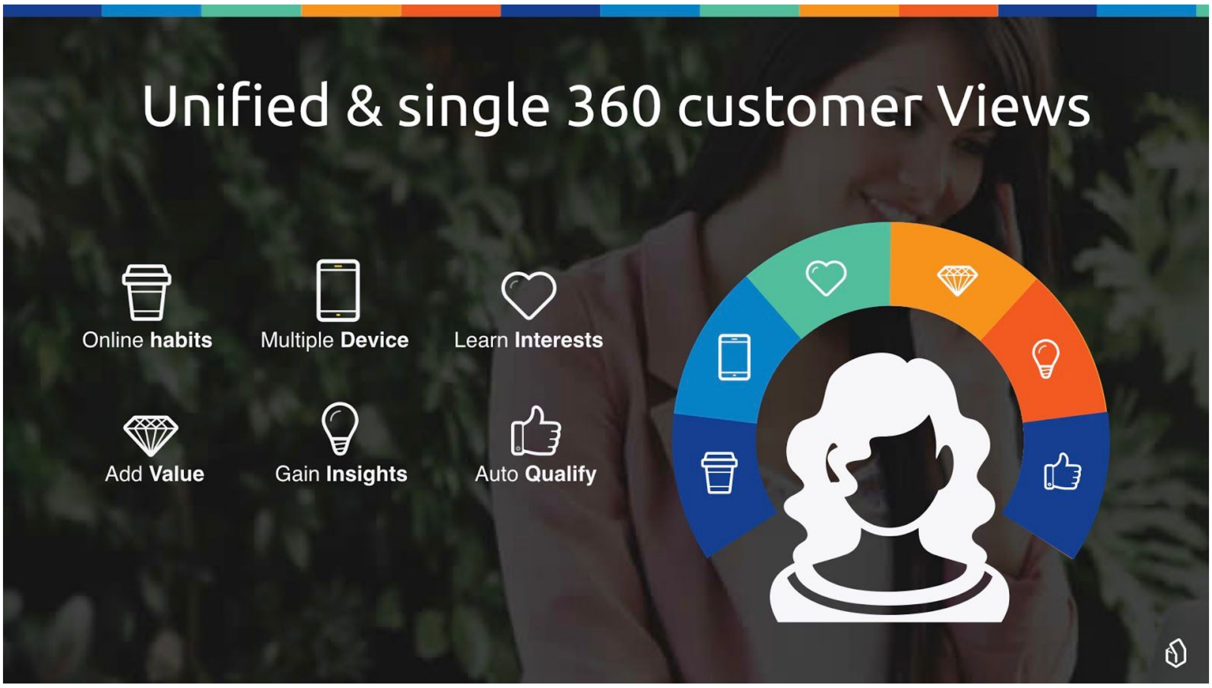
The success factors

1. Create a single customer view

THE CHALLENGES:
Track data cross-domain, device, platform & medium.
You will want to capture all online behaviour (website, email, newsletters, advertising, social, etc.) to create an unified & single 360 View of all your online users. It is essential you track, measure & discover the complete customer journey of your entire online audience.

THE SOLUTION:
Compile unique customer records with integrated data from multiple sources, including website traffic measurement, email & newsletter tracking, external enrichments (company databases), and your own CRM and ecommerce platform. Combined, all this data bundles customer journeys and profiles to deliver real actionable insight.

The solution of your choice should allow you to enrich user data with all accessible first-party data available within your organisation.



KEY TAKEAWAYS:

1. Measure cross-device
2. Measure cross-domain
3. Measure cross medium
4. combine multiple visits into unique lead profiles (aggregate visits into a single online profile)

2. Identify Companies AND persons

THE CHALLENGES:

Just tracking website visitors and translating IP addresses into company names (a simple IP lookup) is not enough to deliver maximum and important value to all your stakeholders. You will need to be able to identify (receive signals) as many activities as possible from your target markets and accounts in order to deliver real value and real benefits. This is a One, Two, or two-punch scenario; a software solution which supports multiple identification techniques, AND sends signals to people on your team that need to hear them.

Additionally, when your business is oriented towards international target markets, you will need to identify visitors from around the globe, not just local in-country companies, and segment leads based on global market regions. Right info to right team.

Customer identification requires more than just identifying company names for your sales teams. This is because a far more significant value is available to your sales teams if they not only discover which companies visit your website, but are also able to identify unique visitors, being individual people from that company. This brings real value to B2B Sales processes'.

Another element which enhances the value of tracking and visitor identification is the ability to filter out “Noise” and so differentiate between leads, prospects, customers, partners, and competitors.

Further complicating this process is the “mobile” challenge. More and more people are using their mobile devices to do business. Handling emails, using social networks, clicking and swiping, responding to online advertisements, and visiting websites are example activities. This brings the challenge of identifying those online visitors when they are not connecting through their company network and IP address.

THE SOLUTION:

Select and implement a solution which provides the ability to identify both companies and individuals. Choose a solution that provides multiple ways to identify leads, prospects, customers and all other visitors. Combine the solution with the data that is already available within your organisation. In practice, this means a solution that can easily connect to and integrate with your email campaigns and newsletters, online forms, customer logins and much more. The possibility for easy integration with your existing data and systems is key. And in order to make sure you can also identify and track the growing community of mobile users, select a solution that provides both mobile visitor identification and the ability to aggregate their visits into a single online profile.

KEY TAKEAWAYS:

1. Identify companies and individuals
2. Distinguish between Leads and existing Customers
3. Local and international identification
4. Integrate the solution with existing data and systems
5. Identify all categories of buyers involved in the customer journey
6. provide two-tiered mapping of individuals and the companies they work for
7. filter out Noise

3. Control & Own your (Big) Data

Keep your friends close, but keep your data closer

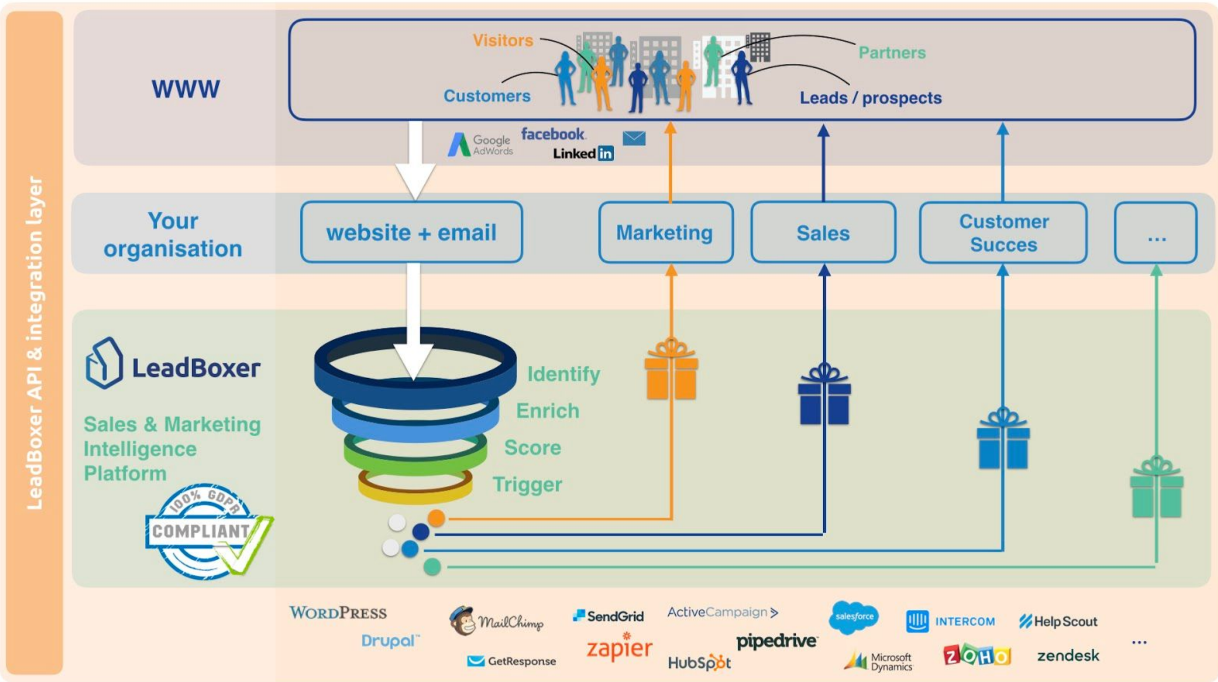
THE CHALLENGES:
Your lead and customer (Big) Data will only get bigger and richer. You need to choose modern technology that is future-proof, robust, and secure, but still able to deliver top-shelf performance.

THE SOLUTION:
Make sure the solution of choice is built with modern technology which allows for high traffic, snappy performance, enterprise class data security, and continuous development and updates. You require a mature and stable code base that has been in development for multiple years.

KEY TAKEAWAYS:

1. Data-driven (scoring algorithms)
2. Enterprise-class security
3. Robust and scalable solution
4. Sophisticated technology

4. Keep it relevant



Get the right data to the right people at the right time

THE CHALLENGES:

The major challenge of customer identification systems is delivering efficiency and actual value to all stakeholders. Getting the right data to the right people and systems at the right time is crucial. In order to realise this you must be able to filter out irrelevant data (Noise) and determine which data is relevant for your specific environment. The relevant data should be transferred as information “gifts” to your people and systems at the right time. For many other systems in your environment this information is only relevant (valuable) if transferred in real-time.

For example, how can you use specific visitor data in your integrated chatbot solution if it is available real-time? A sophisticated and customisable triggering capability is key for notifying or transferring to your people and systems.

In addition the user experience (UX) should deliver efficiency and real value to your stakeholders. If your users are frequent LinkedIn users for their sales and marketing activities, then a frictionless and time-saving integration should be available.

THE SOLUTION:

By Setting up filters to create segments for each use case, you can slowly build up the usage of the solution and increase the value over time. These segments should be the starting point for your integrations.

KEY TAKEAWAYS:

1. Ability to easily filter out “Noise”
2. Sophisticated and customisable triggering capability
3. Real-time integration with other systems
4. Frictionless UX

5. Adaptable and Compliant

Adapt the Solution to your Organisation, not vice versa

THE CHALLENGES:
Your organisation is unique, with specific marketing and sales processes; specific target markets, specific customers and your unique overall requirements. But it is a challenge to configure the customer tracking and identification system in a way which is relevant and delivers the biggest value. Lead scoring is a very clear example of where you will need a system that can follow your specific company requirements.
An additional important challenge currently facing the industry is GDPR. Make sure you, your supplier, and your system are fully adapted to and compliant with GDPR.

THE SOLUTION:
The solution of your choice should give you tremendous flexibility in setting up the data and workflow. Only you should determine what data is being captured, what data is relevant to score on, build your on segments, set triggers and activate integrations.

KEY TAKEAWAYS:

1. Flexible lead scoring mechanism
2. Track and store the specific data that you want
3. GDPR compliant
4. Multiple identification techniques
5. System and user admin functionality for sending signal to Sales

6. No Limits:

Make sure your system is open and completely accessible to import and export data to and from other systems.

THE CHALLENGES:
There will never be 1 system in the new online world (nor in Martech) that will mean everything to everybody. The landscape of Martech tools and systems is enormously complex. A customer intelligence platform that delivers value will have to fit in and integrate easily with existing workflows. Ensure your system is open and completely accessible to import and export data to and from other systems.

No limits also applies to the business model under which you are using the customer identification and tracking system. Any form of measuring engagement delivers more value when there is higher adoption throughout your company and processes. Therefore it does not make sense to limit the usage on number of users, identified companies, etc. Don’t be ‘penny wise, pound foolish’. Select a business model that will not make you overpay once the desired traction and volume is present.

THE SOLUTION:
Important components of a platform which meets the needs described above are the availability of a well documented API, and a system which does not limit the (potential) number of users and identified leads. This also refers to the technical side of things, and

translates into: No limitations for scaling up and performance.

KEY TAKEAWAYS:

1. Cuts through Complexity
2. Scales-up through users and leads
3. Integrates into current workflow