Transform Customer Engagement with a Platform Approach

Optimize Quality, Speed and Reduce Costs in Digital Marketing
Taking a Platform Approach to Customer Experience Technology

Brands of all sizes struggle with managing the complexities of digital marketing and customer engagement. Customer journeys now traverse multiple channels, are behaviorally dependent and can be influenced by a multitude of factors – from social comments to weather to pop culture. For the brand marketer, it’s a constant battle to deepen customer understanding while crafting a relevant engagement strategy that evokes a progressively productive response. In larger enterprises that manage brand portfolios across global regions, these complexities only multiply.

For the enterprise digital marketing IT team, the challenge is similarly complex. IT organizations are under increasing pressure to deliver, maintain, evolve and support an increasingly diverse catalog of interconnected tools and capabilities, shorten delivery times and control costs while simultaneously increasing quality and decreasing risk. This is in addition to the standard operational challenges, triaging of conflicting priorities and reacting to escalations and fluctuating demand from business partners with which most IT leaders contend.

As enterprises search for the most effective operating model for digital IT operations, the leading organizations are finding that speed of execution, quality of service and deliverables, risk mitigation and cost management can be achieved through a platform approach to customer experience technology. By focusing on standardized tools and reusable componentry with a product-driven mindset, this platform approach creates a strategic foundation to continuously expand and optimize capability. It also eases the introduction of truly differentiating capabilities, such as omni-channel personalization, advanced analytics and comprehensive customer data assets needed to deliver best-in-class customer experiences.

When combined with the necessary expertise and processes, the Customer Engagement Platform (CEP) can form the technology core of a dramatic transformation for any organization.
Drive Digital Strategies with a Customer Engagement Platform

The foundation of the CEP is a set of standardized components, templates, integration points and services needed to execute effective customer engagement strategies. The CEP simplifies the digital marketing landscape in complex organizations – from simplifying the process of building effective experience assets such as websites and mobile apps, to launching email, social publishing and listening, loyalty programs, CRM, SEO, SEM, programmatic ad buying, campaign analytics and other marketing and advertising activities. Some guiding principles help bring the CEP to life. What starts as a standardized and integrated technology stack evolves into a platform with product-centric approach to exposing features and capabilities to business end users tied with a focused operational and governance structure. Some of the key themes of designing and operating a CEP are:

- **Ease of use.** With an architectural approach focused on reusability, configurability, localizability, per-site isolation, compliance management and performance, the CEP provides a powerful, easy-to-use solution for all constituents.

- **Separation of platform development and site development.** The platform team is able to focus on a platform level release cadence, the technical roadmap and collaboration with major tool vendors and business leadership. The site development teams can build and launch the site using platform resources to, ensure SEO, security and accessibility compliance, collaborate with brands/business units, creative agencies and third parties.

- **Dedicated support teams and processes.** Though an L1 SPOC help desk provides clear support process and trafficking, L2 and L3 responsibilities should again be split between site operations (application updates and changes) and platform operations (code fixes and solution architecture).

- **Shared services.** Includes monitoring, administration, infrastructure management and technology-specific expertise.

- **End-to-end services anchor partner.** Provides program governance, execution structure, innovation and partner management.

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### Customer Engagement Platform Services

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<th>Development</th>
<th>Operations</th>
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<td>L2–Brand Sites Operation (code fixes)</td>
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<tr>
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<td><strong>Site Development</strong></td>
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<td>- Website Build &amp; Launch</td>
<td>L2 – Platform Operation (code fixes)</td>
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<tr>
<td>- SEO, Security &amp; Accessibility Compliance</td>
<td>L3 – Brand Sites Operation (application changes)</td>
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<td>- Brand and Creative Agency Collaboration</td>
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<td>- 3rd Party Partner Coordination</td>
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<th>Anchor Partner</th>
<th>Operations</th>
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<td>Program Governance, Execution, Structure, Partnerships and Innovation</td>
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<td>Search, DevOps Support</td>
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<td>CMS Admin Services</td>
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<tr>
<th>Infrastructure Managed Services</th>
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Drilling deeper into the capabilities of the CEP unveils the value of the approach. Standardized integrations, such as with CRM, DAM, Marketing Automation and PIM tools simplify the ecosystem, accelerate development and provide cost predictability. Proven workflows bring transparency across teams while enabling effective governance. Advanced capabilities, such as customer data hubs, advanced analytics, segmentation and personalization functions can provide deep insight and differentiation.

Another important feature of the CEP is the focus on preconfigured integrations such as data collection forms, ratings and reviews, site search, tag management, e-commerce, EDW and other enterprise integrations. These provide enhanced functionality in an out-of-the-box manner. Supporting capabilities such as web analytics, personalization triggers, authentication and digital asset management leverage enterprise-wide tools across business units and enable operational costs and process optimization.

Take, as an example, the need to design a new or refresh an existing website on the platform. The activity centers around leveraging a library of pre-built, tested and validated customized assets such as responsive page templates, content layouts and functional components. By leveraging these building blocks, a new brand or business unit website should require minimal (if any) original development – the work focuses more on putting the pre-developed blocks together to build the site rather than original development.

Senior technical resources can focus on platform enhancements, performance and new capabilities. Brands needing additional flexibility in initiating new development can take advantage of the inherent flexibility that is maintained through a process enabling introduction of new features and innovation that, once developed, are available in the core platform for all to share. By having operational separation between site operations (site build, fixes and updates, etc.) and platform operations (monitoring, administration, capability support, enhancements and upgrades) more effective support, optimization, risk mitigation and new feature development are enabled.

Optimizing the functional capabilities and enabling technologies available within the enterprise through a platform approach is one piece of a complex transformation. Creating an operational model that aligns to business priorities and defines internal and external roles and responsibilities is another. With a shared goal of delivering a best-in-class customer experience, it’s critical for companies to implement a governance structure across business and IT to own the CEP roadmap and functional priorities. It’s also essential to have dedicated program management to own the execution processes and program-level technical leadership across the full product suite and to interface effectively with business partners, service providers and agencies.
Choose Your Path to the Customer Engagement Platform

Based on our experience working with a number of global, multi-brand and multi-geo organizations who have undertaken this process at significant scale, we see some commonality. Let’s look at three common approaches to the platform.

Capability driven strategy

For enterprises that are making this journey to a CEP, the path is a progressive and shared process. While it would be a luxury to build and deploy such an integrated approach in isolation (given time and cost constraints), the road to the CEP is more likely a progressive evolution – akin to changing the wheels on a car while it’s driving.

The fundamental process is collaborative, with all parties engaged – business, agency and technology teams. The initial focus is identifying the capabilities needed to provide the desired customer experiences across brands and business units. While larger and more in-focus brands and business units may be the primary drivers of the capability process, collaboration across brand is essential to insure effectiveness, as well as adoption and business support. This capability mapping becomes the basis for CEP design.

Sample Platform Capabilities

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Sample Platform Capabilities
The starting point for many organizations to enable the capability services needed by marketers is the Separate Options stage. This stage is characterized by brands or business units defining their own technology stacks and support models. Based on an older agency-driven model where digital marketing activities were isolated at the brand level and leveraged few enterprise-level resources, business unit marketers relied on creative agencies for technology strategy and support.

While this approach is still used, given the flexibility it affords marketers, there are some inherent inefficiencies. Costs are duplicated across brands and resources are typically dedicated by brand or stack. Additionally, innovation is often stymied – especially for smaller brands – and global governance is difficult to establish and maintain. For the IT organization, this model introduces overlapping and often duplicated technologies with specific skills needed for each thus making achieving scale in this model very difficult.

### Separate Options Approach

#### Key Features

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<thead>
<tr>
<th>Brand - 1</th>
<th>Brand - 2</th>
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<tbody>
<tr>
<td>Platform A Capabilities</td>
<td>Platform B Capabilities</td>
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<tr>
<td>Open Source CMS</td>
<td>Experience Management Suite</td>
</tr>
<tr>
<td>Basic DAM</td>
<td>Advanced DAM (Scene 7)</td>
</tr>
<tr>
<td>No Personalization</td>
<td>Personalization</td>
</tr>
<tr>
<td>Basic Analytics</td>
<td>Advanced Analytics/Tag Mgt</td>
</tr>
<tr>
<td>Limited SEO</td>
<td>Powerful SEO</td>
</tr>
<tr>
<td>No Campaigns</td>
<td>Campaigns, Paid Media, Pixels</td>
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#### Creative, Tech Ops, Marketing Ops

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#### IT Operation Process

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<tr>
<td>IT Operation Process</td>
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<td>Infra Ops and Support</td>
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#### Characteristics

- **Speed to Market**
- **Brand Flexibility**
- **Cost Efficiency**
- **Global Governance**
- **Resource Optimization**
- **Capability Maturity**
Loosely Coupled Approach

By standardizing on a common technology toolset, organizations can quickly improve operational efficiency using the Loosely Coupled Approach. For example, IT-centric processes like infrastructure and technical operations can be harmonized with internal expertise for faster support times and a structured approach to performance and security needs.

Standardizing the toolsets also introduces early opportunities to build reusable and sharable components, such as CRM integrations that lead to improved development times and fewer support issues. While this Loosely Coupled Approach to technology selection still gives brands, business units and their creative agencies unconstrained flexibility when building experiences, it does little to leverage the maturity across the ecosystem.

Many enterprises will initially see this stage as the goal state, but it should be viewed as an interim stage, as the benefits and restrictions are roughly equal. Taking the next step into the common platform significantly accelerates the benefits.
A few fortunate enterprises achieve a state of a mature Common Platform Approach. Rather than a suite of centrally managed and supported tools, the common platform is managed as a product, complete with a defined feature roadmap, product ownership, governance structure and release cycle. Sites are assembled from common platform components rather than developed from scratch. This means library-based templates, layouts and functional elements are easily configured. And creative assets are designed based on pre-defined wireframes.

In addition to a product-focused approach to the capability toolset, program management is a parallel focus in this stage. Program leadership, often centralized with an anchor partner, helps establish executive governance, process definition and management for the various roles, vendor SLAs and planning and reporting.

Using this approach, we’ve seen new-site development times for moderately complex sites drop from many months to weeks or even days. Platform components and tools are designed and evolve to meet the majority of business capability needs and new features are prioritized into the product roadmap and released on a defined schedule.

While focused on reusable tools and components, the structure for the Common Platform Approach also accommodates the inevitable need for customization driven by specific business, brand and market needs. These individual enhancements are accommodated and subsequently rolled into the common toolset and made available to all platform participants. This provides an important path to bring more mature capabilities to brands and business units that otherwise would miss out.

### Characteristics

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### Business Operations

- Content Management
- Content Publishing
- User Setup & Access
- Templates & Components
- Cache Purges
- 3rd Party Interactions

### Tech Operations

- Onboarding/Migration
- Platform Management
- Brand Tech Ops

### IT Operations Process

- Platform Monitoring
- Ticket & SLA Management
- Devops
- Infra Ops and Support
- Application Support
- Help desk Support

### Tech OPS, Marketing OPS

- Key Features
  - Assembled Brand Experiences (Template Driven)
  - Creative Services (Brand Chosen Agencies)

### Infra OPS

- Platform Monitoring
- Ticket & SLA Management
- Devops
- Infra Ops and Support
- Application Support

### Marketing OPS

- Workflows
- Functions
- Integrators

### Brand Flexibility

- Global Governance
- Capability Maturity

### Resource Optimization

- Brand Flexibility
- Global Governance
- Capability Maturity

### Brand Tech Ops

- Platform Monitoring
- Ticket & SLA Management
- Devops
- Infra Ops and Support
- Application Support
- Help desk Support

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- Platform Monitoring
- Ticket & SLA Management
- Devops
- Infra Ops and Support
- Application Support
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Customer-Centric Digital Marketing Delivers Dramatic Results

The target state of the customer-centered digital enterprise should be to create differentiation and competitive advantages – with the additional benefits of optimizing operations and costs. Our experience shows that with a platform approach, dramatic results are possible. For example, one Fortune 50 company realized a 40% decrease in total cost of ownership (TCO) and 50% decrease in time-to-market while achieving 100% adoption by business units. It also achieved 100% compliance to privacy, security and legal standards while delivering best-in-class digital experiences to consumers.

Another customer has achieved a 30% cost and time-to-market savings across more than 200 brands in 50 countries. At yet another client, quality improvements for this global retailer decreased open incidents by 33% and brought ticket turnaround times down from 10 days to three.

To ensure successful transformations like these, business, agency and technology teams must work collectively. Website releases and mobile apps need to have timelines estimated in weeks, not months. In addition, capabilities must evolve along with new tools, new integrations and new priorities. This means a culture of innovation must exist and a governance process for introducing change must be established. At the same time, mechanisms must be put in place to ensure both cost predictability and the solution’s effectiveness. A shared vision, clear roadmap, experience and a collaborative spirit are essential to achieving these powerful results.

The initial step in this transformation is standardizing digital marketing technologies across the enterprise along with a component-driven architecture approach that focuses on reusability and shared assets that will drive speed, quality and cost savings. A constant focus on reusability, new feature development and innovation, often driven by larger and priority brands and initiatives, ensures creative flexibility and extends the core platform across the organization.

To truly reap the benefits and drive substantive value into the future, enterprises must approach the management and support of the platform as a product, rather than a collection of tools. A CEP helps ensure this.
Ready to optimize quality, speed and reduce costs with a platform approach to digital marketing?

Contact Mindtree to schedule a workshop and start transforming customer engagement at your organization.

During the workshop, our team will collaborate with you to understand your current ecosystem, business priorities and high-level challenges and provide valuable insight on:

- Current ecosystem (tools, structure, service, support, scope)
- Business priorities
- High-level challenges

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