DATA-DRIVEN ENGAGEMENT
For Modern Marketers
“Always Be Collecting Data.” It’s the ABCD of marketing, but in the zero-party data age where an opt-in and an email address are merely a start — complemented by a host of granular self-reported preferences and psychographic data, from all manner of sources — how do marketers unify, harmonize, and action it?

In the data economy, you never thought you would hear marketers complaining about having too much data. But for all too many marketers, that is precisely the problem — nearly a third of marketers have “too much” data to analyze, while a staggering 63% are not able to realize a single source of truth for their customer data.

Modern brands are awash with data, but it’s fragmented from all manner of sources. Consumers interact with brands on multiple digital channels, purchase online, at bricks-and-mortar, or a third party, as well as engage with loyalty initiatives. But the data from all these touchpoints resides in disparate systems like analytics, email, mobile, campaign management, point-of-sale, and social — which are not integrated, nor were designed to be.

Marketers have no way of seeing the customer in a unified, single view, which is necessary to fully understand each customer and provide them with a personalized experience. The opportunity to wow the customer is lost forever.

Each and every vertical is undergoing rapid digital transformations, however even the most modern and forward-thinking brands have headaches managing brands and data sources in different territories, time zones, and languages. Data silos are an unfortunate inevitability.

Ultimately, if you can’t efficiently store and unify your data in one place, it will inhibit your ability to put it to work and drive value from it. And in turn, hamper your capacity to deliver a truly personalized, excellent customer experience.
LOTS OF DATA... NOT A LOT OF INSIGHT
THE NEED FOR A SINGLE SOURCE OF TRUTH OF THE CUSTOMER
POWERING CAMPAIGNS WITH THE RIGHT DATA
TURNING INSIGHTS TO ACTION
THE ENGAGEMENT DATA PLATFORM: THE EVOLUTION OF A CDP
CUSTOMER CONNECTIONS THROUGH DATA-DRIVEN EMAIL
DATA-DRIVEN EMAIL CAPABILITIES
LOTS OF DATA...
NOT A LOT OF INSIGHT
Despite the clear dysfunction created by having fragmented views of the customer, we continue to see organizations struggling with multiple data silos and competing versions of the truth. On average, marketing departments have a tech stack boasting 12 systems — the vast majority of enterprise brands are using many more. This list of endless tools, from CRM to marketing automation, email to analytics, CMS to social reporting all aid marketers in improving results...but how well do they harmonize?

Without a single source of the truth, it’s easy for marketing teams and entire companies to end up working feverishly on the wrong activities that fail to move the needle. Without a single customer view and real-time insights, organizations struggle to deliver the quality experiences that customers are looking for today.

Unfortunately, many brands are struggling with a litany of problems such as legacy systems, data residing in disparate silos, huge martech stacks mentioned above, as well as numerous sub-brands and territories with unique KPIs. Not to forget the quality of the data swimming around is quite often imprecise.

A single, accessible view of the customer empowers brands to understand and better engage with its customers by knowing who they are and what they are looking for. It acts as the single source of truth about your customers and gives you the ability to analyze past behavior in order to better target and personalize future customer interactions. It’s quite simply an aggregated, consistent, and holistic representation of each customer across any digital channel.

58% of marketers indicate integrating customer data is a major obstacle in a multi-channel strategy.

12 systems

on average marketing departments have 12 martech tools in their stack
THE NEED FOR A SINGLE SOURCE OF TRUTH OF THE CUSTOMER
A single source of truth, or golden record combines meaningful, reliable data from multiple systems into a single view that’s more accurate, more complete, and truer than the data from any single source.

The single source of truth serves as a complete record for all relevant customer information across the organization that users can turn to when they want to be certain they have the most up-to-date data on a particular customer or prospect. Marketers know that to build lasting and more meaningful relationships with customers they need accurate, timely, and trustworthy data. The closer marketers can get to the utopia of a golden record, the more likely they are to interact with customers through preferred channels with preferred messages.

To cut the marketing buzzwords, the single source of truth is quite simply a unified customer profile, which includes identifying information about the customer, the channels they use to interact with the organization, their most recent interaction with the organization, and which recent offer they reacted to positively. The single source of truth also encompasses how a customer engages with the organization, including their most recent activity and lifetime value, complemented by a raft of preference and behavioral data.

All of this information is pulled from different data sources and blended together into the system creating the single source of truth.

Because this golden record pulls from so many data sources it’s also dynamic — as customer preferences and/or transaction history change, the record changes with it. If a customer interacts with an organization primarily through email, and then switches to interacting mostly through social media, the system underpinning the golden record would notice this change and update its data accordingly. If the customer also decides to purchase something via a mobile app instead of a desktop interface, the golden record will update the relevant information.

As a result of this flexibility, creating and maintaining a golden record can be transformative in customer engagement. This means marketers should, in concert with IT, seek out data management solutions that can streamline data collection, ingestion, and cleansing to put the organization on the path to creating a golden record and, eventually, enabling a 360-degree customer view.
58% of enterprise CX leaders agree that lacking a single view of the customer and customer journey is the #1 challenge for effectively measuring customer experience.
POWERING CAMPAIGNS WITH THE RIGHT DATA
The converging forces of privacy legislation sweeping the globe, consumers more cognizant than ever of privacy preserving tools, and browsers curtailing cookie tracking have meant consumers are likely to only continue doing business with the brands that they trust and who tailor campaigns to them.

The future of marketing to individuals with relevance is about asking them about their interests, motivations and desires, rather than inferring or snooping on them. This is zero-party data. A class of data that is intentionally and proactively shared by the customer.

It is possible for marketers to know what customers intend to do or buy in the future by collecting data that is intentionally and proactively shared directly by the consumer.

Unfortunately it’s not merely a case of “build it and they will come.” Modern consumers expect to be entertained, engaged, and receive something in return for their attention and personal data. Marketers can deliver this through interactive experiences that conduct market research, accrue opt-ins, and deliver an altogether better experience with a tangible value exchange for the consumer in the form of added value (coupons, competitions, social kudos, or content, to name but a few). Delivering interactive experiences over interruptions is the key to collecting the permissions and preferences required to start building more meaningful relationships with consumers.

Zero-party data empowers marketers to build direct relationships with consumers and, in turn, better personalize their marketing efforts, services, offers, and product recommendations. As it comes directly and willingly from the consumer there are no intermediaries, no guesswork.

This zero-party data, along with first-party data, will be absolutely essential in creating personalized campaigns that build a path toward engagement, and then emotional loyalty.

10–30% uplift in revenue and retention with data-driven engagement

All data collected through experiences, anywhere in the customer journey can be appended to the customer profile within the Cheetah Engagement Data Platform.
The reality is that consumers want better personalization: approximately 80% of them say it’s important to them.

McKinsey & Company
The changes in the buying journey from linear to multichannel have sparked a need for brands to better understand their customers’ behaviors, past histories and what action they will take in the future. Without this understanding, marketers routinely fall short of providing highly relevant, personalized, and contextually aware offers and messages.

A new class of solution, the Engagement Data Platform (EDP), meets this need by enabling an always-on, always-processing single source of truth that facilitates a unified and complete view of the customer. In an age of digital transformation, it is this deep understanding of customers that will separate the winners from the also-rans.

To truly turn insights into action you shouldn’t have to ask another team or department, “how are my campaigns performing?” You need all attributes, metrics, and dashboards, as well as other analytic capabilities at your fingertips to help with audience creation, segmentation, decision making, and corrections, as well as helping others understand marketing performance.

Going a step further, you need progress from guessing what’s going to be most relevant and engaging to your customers. Understanding customer behavior helps you engage with them in a personalized, meaningful way; anticipating customer behavior enables you to keep ahead of the competition by delivering the right experiences at the precise moment a customer engages.

If your data platform incorporates Artificial Intelligence (AI) and Machine Learning (ML) you can use data to understand behavior and anticipate what they are likely to do next. This includes algorithms for propensity scoring, clustering, and send-time optimization.
Data-driven organizations are 23 times more likely to acquire customers 6 times as likely to retain customers, and 19 times as likely to be profitable as a result.

McKinsey Global Institute
THE ENGAGEMENT DATA PLATFORM: THE EVOLUTION OF A CDP
The Customer Data Platform Institute defines a CDP as “packaged software that creates a persistent, unified customer database that is accessible to other systems.” A CDP does more than just bring all of the data together, or provide the single source of truth we’ve extolled the benefits of above — critically, it provides marketers with an accessible, and actionable view that can be used to drive meaningful engagement with consumers.

The Cheetah EDP has all of the features expected in a CDP, as well as most of the distinguishing features that meet the need for today’s marketer. What differentiates the Cheetah EDP from a traditional CDP is that it provides marketers with that holistic view of the customer, machine learning, native omnichannel touchpoints, and solutions that drive customer acquisition, loyalty, and retention. Together, these capabilities provide marketers with solutions to create value throughout the customer lifecycle, from acquiring customers to watching them become brand advocates.

Marketers and their customers deserve better. While CDPs claim to be holistic solutions for gathering data and presenting a unified view, they fall short at taking action. That’s because many CDPs are IT-driven data environments — they ingest various data types but rely on costly and time-intensive integrations to deliver value.

With the EDP, as consumers engage in mobile apps, social media platforms, chat applications, and other touchpoints, this data is ingested in real-time. It’s also imperative you can act immediately upon insights gained through a data platform. Having access to touchpoints, through native activation without the headaches of costly integrations, will help you.

49%

data-driven organizations see a 49% increase in spontaneous purchases by consumers

19X

data-driven brands likely to be 19x more profitable
You don’t guess what’s going to be most relevant and engaging to your customers, you use data to tell you. If you want to evolve from being a data-centric marketer to a customer-centric marketer, what you need is the Engagement Data Platform.

Cheetah Digital’s Engagement Data Platform has many capabilities, including:

- **Enterprise Data Management**
- **Accessible and Advanced Analytics**
- **Connectors Framework**
- **Data Transformations**
- **Integrated Machine Learning**
- **Trigger Engine**
- **Audience Segmentation**
- **Streaming Data Ingestion**
- **Smart Messaging**
Cheetah Digital solves data, automation, and services needs comprehensively. Today’s Cheetah Digital combines several solutions from recent acquisitions brought to market as the Customer Engagement Suite.

The Forrester Wave™ Email Marketing Service Providers, 2020
PUTTING THE THEORY INTO PRACTICE: BLOOMIN' BRANDS
Bloomin’ Brands restaurants are adored by American diners. Its flagship subsidiary, Outback Steakhouse, has been delighting diners for over 30 years and is synonymous with hand-cut steaks, the famous Bloomin’ Onion and pioneering curbside pickup.

Bloomin’ consists of several casual dining brands, over 1,500 locations in 48 U.S. states, and dedicated marketing teams for each restaurant chain. That all means a lot of customer data from different sources housed in disparate silos — a headache for any marketing department. Enter the Cheetah Engagement Data Platform.

Bloomin’ Brands were early adopters of the EDP, embarking on a digital transformation that involved firstly shifting advertising spend from expensive television slots to digital, data-led initiatives, where it could reach its customers more effectively.

Previously, where it relied on a flabby martech stack comprising a staggering 82 platforms, it turned to the EDP to house its vast amount of customer data in a single source, with the power to target individual customers with personalized, contextually relevant messages that went behind freebies and discounts.

The EDP empowers Bloomin’ to deliver real-time messaging fuelled by first- and zero-party data that analyzes past dining behavior, their stated wants and preferences, and contextual data like the weather to better target and personalize customer interactions.

This data-driven strategy has seen Bloomin’ Brands swell its loyalty scheme with over 10 million unique members and triple off-premise sales during the Covid-19 pandemic.
Cheetah Digital provides the ability to generate a single customer view that we can continuously augment and refine over time to inform our various cross-channel and cross-brand initiatives.

Michael Stutts, Chief Customer Officer, Bloomin’ Brands
The Cheetah Digital Engagement Data Platform encompasses more features of any provider assessed by the CDP Institute.

Areas we cover:

• Accept all Data Sources
• Retail all Detail
• Persistent Data
• Unified Profiles
• Manage PII
• External Access
• Segment Extracts
• Schema-Free Data Load
• Real-Time Data Load
• Client-Built Data Load
• End-User Data Load
• Real-Time Access
• Persistent ID
• Deterministic Match

• Website Tag
• Cookie Management
• Ingestion SDK
• Name/Address Match
• Account-level data
• End-User Segmentation
• Manual Predictive
• Automated Predictive
• Dynamic Content
• Real-Time Messages
• Multi-Step Campaigns
• Multi-Channel Campaigns
• Cross-Channel Arbitration

Download CDP Institute Vendor Comparison Report
CUSTOMER CONNECTIONS THROUGH DATA-DRIVEN EMAIL
There are numerous touchpoints in which one should be connecting with your customer, but email is still comfortably the preferred channel of consumers for receiving offers, content, incentives, and rewards from brands. However, rising above the noise in crowded inboxes and making that connection can be a challenge. Catchy subject lines might accrue you an open, but it’s imperative you’re respecting your customers’ preferences and privacy, as well as delivering content that adds value.

Powering email from an engagement data platform empowers a marketer to more closely align with customers’ expectations, improve the relevancy of emails, and make that all-important connection.

Connecting email to your data platform, without the headaches of costly integrations, means you can drive engagement with your customers through data-driven email programs. You can define audiences using the most up-to-date customer profile and run queries on large data sets — then you can apply analytics in real-time, such as content and product recommendations, as well as send at the optimal time, trigger campaigns based on online behavioral data, or other real-time events.

Additionally, with a data platform, you can go beyond static lists, or antiquated relational databases, and not rely on an email address as the unique identifier. This helps you tie together many different attributes, which provides a clearer view of a customer and optimize personalization.

180% when it comes to driving sales, email beats banner ads, social media native apps and organic posts by 180%
DATA-DRIVEN EMAIL CAPABILITIES
Once email is integrated with your data platform, you can launch data-driven email programs, such as:

01 **WELCOME/ON-BOARDING**
Use personalized content to make connections in the early stages of a customer journey to drive engagement. Automate the onboarding to activate other channels.

02 **TRIGGERED EMAILS**
Trigger and personalize email communications in real-time. Triggers can be executed via any other channel and can be perfectly timed for personalized campaigns, which research shows yield better results than batch emails.

03 **RE-ACTIVATION**
Trigger campaigns based on lapsed activity to reconnect with customers, who might be an attrition risk.

04 **INCORPORATE ANALYTICS**
Use machine learning (ML) and analytics for product recommendations, send-time optimization, propensity to open, as well as launching campaigns based on any customer engagement in real-time to engage users at the moments when they are most likely to take action.

05 **CROSS-CHANNEL**
Incorporate and automate highly personalized email messages alongside content sent through your other online and offline marketing channels.

06 **BEHAVIORAL**
Incorporate web data for the personalization of emails, to ensure the email experience is consistent with the web, or in-app experience, as well as recent online activity that goes beyond an abandoned cart use case.

30% of U.S. consumers are more likely to engage with email marketing that is personalized.
73% of U.S. consumers have made a purchase from an email sent by a brand or retailer in last 12 months
PUTTING THE THEORY INTO PRACTICE: LEUPOLD & STEVENS
The over-100-year-old optics brand Leupold & Stevens bulldozed its traditional email marketing techniques and turned to a strategy rooted in data-driven engagement.

First they deployed a Cheetah Experiences-powered sweepstakes and collected essential Personally Identifiable Information (PII) data like name and email address, but this was supplemented by an additional nine psychographic data points on each entrant to the sweepstakes. Actionable data like: product preferences; budget size; in which channel they planned to purchase; when they planned to buy; as well as the product feature most important to their purchase decision.

Why not try out a sample experience*

*this is a sample, not a live experience

70K entries in 3 weeks

600K+ psychographic data points collected
02 PHASE

Instantly upon entry, Leupold & Stevens used the data collected to deploy hyper-personalized emails that elicited action. They used dynamic content, delivering over 50 potential email variations — using the entrant’s name in the subject line as well as the explicit dollar amount that the entrant revealed as their budget in the sweepstakes poll. The email content then suggested only products that met this specific budget.

The copy supporting each recommended product in the email was also tailored to the exact features the entrant chose as most important to their purchase decision. They also went so far as using imagery in the email that aligned directly with the entrant’s intended use of the product, as well as CTAs that linked to product pages in the specific channels that the entrant said they wished to shop.

The result was the most successful ecommerce capable marketing email Leupold & Stevens had ever sent, both in terms of engagement as well as revenue booked.

70% open rate on automated emails sent immediately after entering the sweepstakes

45% click-through rate on hyper-personalized product recommendations
It consists of Cheetah Messaging for email and cross-channel marketing, Engagement Data Platform for data management and analytics, Cheetah Experiences for customer acquisition, and Cheetah Loyalty for customer retention. Forrester finds this vendor's data collection, interface navigability, and reporting much improved from our 2018 evaluation of the same functionality.

The Forrester Wave™ Email Marketing Service Providers, 2020
It’s time to look beyond transactional data to build thriving customer relationships that deepen at every touchpoint. With Cheetah Digital’s Customer Engagement Suite, you have an entire platform at your fingertips to help you drive revenue and deliver a unique value exchange throughout the customer lifecycle.

Cheetah Messaging
We enable marketers to create and deliver relevant, personalized marketing campaigns across all channels and touchpoints.

Cheetah Loyalty
We provide marketers with the tools to create and deliver unique loyalty programs that generate an emotional connection between brands and their customers.

Cheetah Experiences
We help deliver interactive digital acquisition experiences that will delight customers, collect first and zero-party data, and secure valuable permissions needed to execute compliant and successful cross-channel marketing campaigns.

Cheetah Engagement Data Platform
Our foundational data layer and personalization engine enables marketers to drive data from intelligent insights to action at speed and scale.

Start building lasting customer relationships at cheetahdigital.com