



5 core tactics to improve CX and drive conversions

BEST PRACTICE GUIDE



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Customer experience is key to growth

Winning brands who operate in a competitive environment need to woo their customers. Mastering the customer experience (CX) will help your organization engage with customers, retain their business, and sustain their loyalty long term.

How to create a winning customer experience:

Achieving a seamless CX means realizing your competitive advantage. Customers want fast, intuitive, and useful services for a positive and memorable experience. Customer satisfaction will naturally encourage retention and loyalty, creating a successful strategy for business longevity.

The devil is in the data. Translating insights into powerful campaign rollouts provides a bedrock for first-class customer experiences. Joined-up data points spanning demographics, preferences, and behaviors have the power to drive rich and meaningful customer actions.



Here at Dotdigital, we preach a fivefold ethos to our customers:

GROW:

Capture useful data while adopting powerful marketing channels

CONVERT:

Target customers with relevant content at the right time

RETAIN:

Deliver personalized experiences that fit future customer needs

INTEGRATE:

Seamlessly connect with customers across multiple touchpoints

OPTIMIZE:

Make the customer experience fluid and effortless



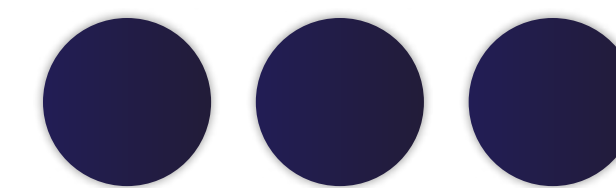
Grow

Grow through data capture and channel adoption

Every growth marketer needs a cross-channel marketing platform that boosts acquisition. Data-capture tools are essential for increasing marketing contact lists, getting to know your prospects better, and converting them with powerful campaigns that have been personalized based on relevant data.

With the right marketing channels to hand, your data-driven messages can be delivered to customers at the right time on the desired device.





B2C growth tactics

Capture prospects' data

When prospective shoppers visit your e-store, it's likely they're in the market for your products. You shouldn't ignore these contacts and hope that they just place an order. In the first instance, capture data like their name and email address for your marketing program. You can capture this information with an email capture pop-up, or via a form clearly visible on your webpage. Once contacts have consented to receive your marketing, you'll be able to send them relevant newsletters prompting them to browse and buy.

There's no need to play it cool

New contacts who have signed up will expect to hear from you quickly. Sending a nice welcome email introducing your brand and products can make a great impression. A cheeky welcome offer wouldn't go amiss either.



Get to know your new leads

Including a preference center within your welcome program is an effective growth tactic too; not only can you get to know customers better, but ask them which promotions and channels they prefer. This puts a positive spin on the customer experience as shoppers will feel like they're in control.

Then you can start to prioritize personal data such as date of birth and location. This insight allows you to send automated growth campaigns like birthday messages and location-based offers to increase orders.

Catching customers at the right moment with an email or SMS can encourage them to redeem relevant attractive offers. So, through data capture and channel adoption, you've started to generate customer engagement that will spur your brand's growth.



B2B growth tactics

Maximize intent

For B2B companies, a prospect landing on site is a clear sign of intent. At this early stage it's a good idea to ask for key data so you can enhance your proposition and make it more appealing.

Find out more

If contacts have subscribed to your marketing or asked for a trial, jump at the chance to get to know them better. Invite prospects to fill in a preference center via email or an ongoing live chat. Using forms and landing pages, ask for key data that's relevant to your business: job title, industry, company revenue etc. Capturing this information will help you build a healthier, more reliable pipeline to help you grow.



Nurture your leads with tailored messaging

Now you're set to nurture your leads through progressive profiling; the more you find out about prospects, the better you can tailor your product, service or solution.

Gradually gather demographic and preference data over a longer period of time and across relevant channels. Rather than asking prospects to fill in a long form and risk drop-off, capturing data sequentially gives you a bigger chance of successful conversion.

Remember important data like contract end date or business challenges are powerful insights for your growth marketing team to drive opportunities.



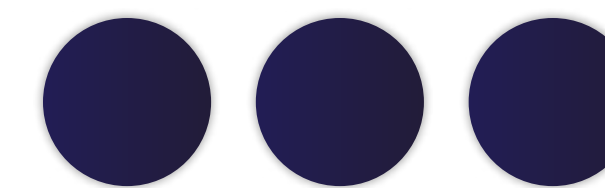
Convert

Convert using segmentation, automation, and recommendations

Conversion not only rests on shopper intent, but your own marketing skills too. Putting all the data you've collected to good use helps generate conversion opportunities. You can achieve this by automating unique product offerings for the customer – data-driven messages that communicate something meaningful, based on existing customer needs.

A holistic data approach is useful for tailoring your content and delivering messages at the right moments. Layering behavioral data such as website activity on top of your existing demographic and preference information can empower your customer experience. Such levels of personalization increase the chances of conversion.





B2C conversion tactics

Collecting the right data isn't enough – you've got to use it for the right purpose: conversion.

Turn data into opportunity

Translating behavioral data into meaningful messages that prompt customer action is key. One example is to populate emails with dynamic content based on an individual's unique location. An apparel brand could send weather-proof products to contacts living in New York where it's currently raining.

What's more, unlocking online activity helps brands decipher customer interest and intent. For example, who is opening emails and clicking through, but not placing an order? Here, brands can encourage a sale and make the shopper's life easier by recommending products that the contact is looking for.

Segmenting contacts based on their digital behaviors helps to identify who's hot and who's not. Your team could deploy a retargeting ad or an abandoned browse/cart campaign as a well-timed nudge. For instance, a contact may be browsing for summer vacations but is hesitant to commit to a booking. You can use the data you've gathered on this contact – Greek islands, August, all-inclusive – to target and convert them.

B2B conversion tactics

B2B still means human to human

The people who work in B2B are also everyday consumers and humans. They respond positively to friendly, relevant messages that mean something to them.

Personalization is for every industry

Personalization shouldn't just be viewed as a B2C marketing tactic, but a tactic that all sectors and industries can benefit from. B2Bs leading in personalization are focusing on account-based marketing as a way of specifically targeting different types of businesses. Personalizing product and service pages per sector is an effective way of cutting the noise for prospect. You can tailor pages based on their specific contact attributes, including the sector they work in and the products or services they've recently viewed.



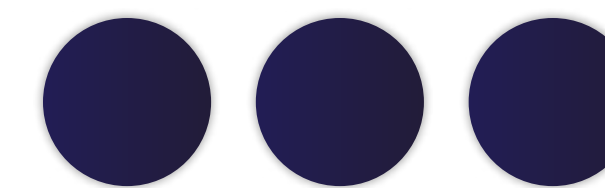
Follow your customers' lead

Acting on specific high-intent actions is also essential for acquiring customers; these conversion points should be monitored for activity as they are the best indicator for potential business opportunities. If contacts are viewing pricing pages, requesting demos, or submitting surveys, it's key to follow up and convert the engagement into an opportunity and then a deal.

Create a seamless journey

Linking up your prospect's journey transforms your data into valuable insight for your marketing team. When you track the brand interactions of a contact or an account, from first touch to conversion, you're empowered to guide prospects more effectively. The devil is in the data; a detailed view of engagements makes it easier for you to send the right messages that prompt customer action.





See the big picture

The path to purchase, whether short or long, consists of two-way interactions between your business and its prospects: content viewed, forms submitted, and events attended. Knowing this information allows you to curate a more personalized journey, increasing the chances of conversion. You can translate this website and CRM data into unique cross-channel campaigns that speak directly to prospects.

The same can be said once they're onboarded as customers. If you want to increase repeat orders, upsell or retain the account for another term, data-driven prompts are your best bet for realizing those all-important customer actions.

How Dotdigital empowers you

Within Dotdigital's Single customer view (SCV) you can easily turn an individual customer into a marketing persona ready to use in your marketing strategy. Create a lookalike segment that automatically pulls together all contacts who look, behave, and buy like the one you're looking at. This makes it super easy to expand on winning strategies and reach more of your audience effectively.

Retain

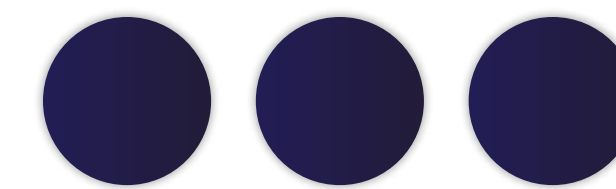
Retain with personalization, preferences, and retargeting

Strong customer acquisition rates are not the sole indicator of business success. Retention is key to supplement future growth. You need a healthy customer base to prop up your business and maximize new opportunities. The key is converting first-time customers into loyal advocates who return, repeat-buy, and recommend.

How do you do this?

By not leaving new customers in the lurch to fend for themselves. The best way of solidifying new customer relationships is having a robust, yet dynamic customer journey in place. Design simple or elaborate unique experiences that keep customers sticky. You can achieve this level of detailed personalization through customer insight and preference features, plus cross-channel automation tools.





B2C retention tactics

Strike while the iron is hot

Recent customers undergo a honeymoon period with your brand. It's a delicate, opportune time for marketing teams to grow and strengthen the relationship, make more money, and extend customer satisfaction.

Data doesn't need to be complicated to be powerful

The keystone of this strategy is driving more customer value; the solution, as always, is data. Start with dynamic content in email campaigns, which you can populate from contact data fields based on anything from location, preferences, website behavior, and last order item. This will make customers' aftersales experiences much more compelling. Relevant tips on how to get the best use out of their new product or complementary upsell recommendations based on past purchases helps to drive more customer value.



Create data-driven conversions

Brands that track customer interactions can better inform their target marketing strategies. As the relationships between your brand and customers grow, you can begin to use purchase data – like order recency, frequency and monetary value (RFM) – to drive repeat conversions. You can pin-point where customers are in their journey with you depending on how recently they made a purchase, how often they do, plus how much they spend on average.

Utilize automation to drive retention

A great way to drive more orders is to set a trigger for customers whose purchase date has lapsed by three or maybe six months. You could also tap into your higher-spending segment with exclusive product ranges and your more frugal customers with tempting limited-time promotions.

Don't rely on satisfaction as the key to your customers' hearts – strive for delight. This will pay more dividends in the long run.

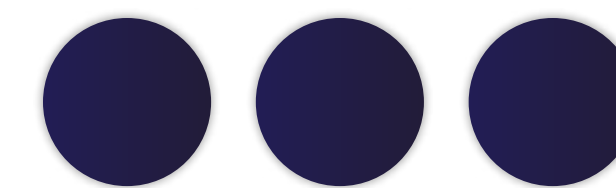


Gather and promote social proof

You can capitalize on positive feedback as a means to gain new customers. Social proof has become a familiar stop-off point during the customer journey. People want to know about other people's past experiences before committing to a purchase themselves. Using a forms and landing page tool, you can create branded product surveys for customers to rate and review their experiences. Not only will this empower your brand reputation, but help you improve products and services for new and existing customers.

Feedback is always super-valuable for refining the overall customer experience. Sharing this insight across your business can help align products, services, and experiences for more seamless customer journeys.





B2B retention tactics

Use your CRM to truly understand your customers

The secret to great long-lasting B2B relationships is a commitment to understand and realize customer needs. Whatever your business, your customer accounts in CRM will include a multitude of valuable data to help you decipher what customers need to grow and thrive.

Looking at previous orders, which products and services are and aren't being used, and meeting notes can enable customer success teams to grow and retain their accounts. Customers' expectations can then be met more effectively at every touchpoint. Client-facing teams will find it easier to cross-upsell and renew contracts, all the while fulfilling customers' needs in the long run.



Always stay one step ahead

Customers will leave you if you don't invest in and innovate your products and services. Your product teams should be working hard in the background to ensure you remain ahead of the curve. The best way for marketing to help is to capture valuable customer feedback on products, services, and experiences. It's not just about improving products, but streamlining processes that make the customer experience ship-shape.

Let your customers tell you what they want to see

Branded feedback forms are the best place to start. Don't overwhelm contacts with too many questions – just get straight to the point. What did they like; what didn't they like; and what could be improved. NPS is also another great customer-satisfaction indicator because it reveals how likely customers would recommend your business to another brand.

Focusing on customer feedback can help your business supercharge its growth and consolidate its customer base.



Integrate

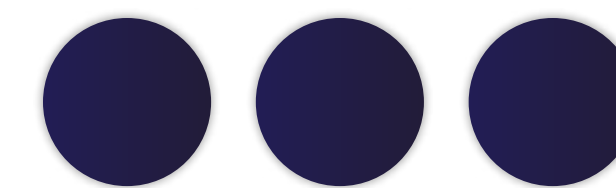
Connect with customers through cross-channel automation and platform integrations

Establishing strong customer connections doesn't come easy. As a business, you've probably got multiple systems operating in silos which ultimately hinders the customer experience. When data is split up, the customer journey gets broken up too. That's why integrating your systems with your cross-channel marketing automation platform is key.

When your data lives under one roof, you can do much more with it. Hooking up your tools today will help you scale tomorrow, broadening your brand's horizons.

Dotdigital's seamless connections with the platforms you're already using are always adapting to future changes, meaning you only need to go through set-up once. Pick from available plug-ins to custom-designed connections within our wide API suite.





B2C integration and channel options

Integrate for smooth synchronicity

The most effective way to grow, convert, and retain is to integrate your ecommerce system with your cross-channel marketing automation platform.

Gone are the days of data uploads and sluggish syncs; today you can access all the data you need in platform and access platforms like Adobe Commerce using single-sign on.

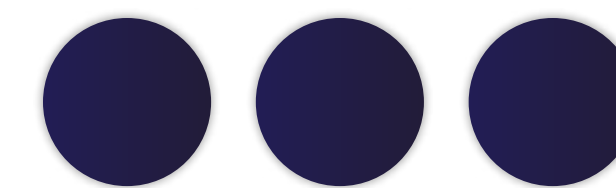
Recalling important customer data empowers your team to curate unique customer offerings at the click of a button. With data to hand and the right channels in place, connections between your brand and your customers become closer and more relevant.



Take a cross-channel approach

Today's customers expect timely, relevant messages through the right channels. B2C brands have to take their customers' preferred channels into account. So, ask them about their communication preferences while capturing other important data in your preference center. But you can't please everyone by just using multiple channels in your marketing. For seamless engagements and optimum customer experiences, all the channels you adopt should be connected.





How Dotdigital makes it effortless

The Dotdigital platform consolidates channels under one roof, empowering marketers to build data-driven cross-channel marketing programs.

Personalized triggers and uniquely-curated automations go a long way in meeting and exceeding customers' expectations. From live-chat signup, welcome email programs, order updates via SMS, and push notifications of delivery, cross-channel marketing is the best way of realizing all your integrated data opportunities and ensuring you're targeting your customers on the most effective channel, every time.



B2B integration options

Integrate to elevate

Scaling your B2B opportunities is only possible when you connect your disparate data. That's why integrating sales and marketing is so important; disjointed teams equate to poor sales and business stagnation.

That's why Dotdigital offers out-of-the-box integrations with the world's leading CRMs – to empower marketers with data access and utilization, creative content curation and cross-channel messaging. Marketers don't have time to dither; they need to act fast on data to generate leads for sales to convert.



**Integrating sales
with marketing can
multiply prospect
and customer
conversions.**

Go wherever your leads are

Cross-channel is no longer an industry buzzword. It's becoming the bread and butter of leading businesses with a competitive advantage. In a world where prospects conduct all their research online, reaching them on the right channel has become even more crucial.

Adopting a platform that integrates channels through data-driven marketing programs not only streamlines campaign creation and rollout, but helps businesses meet their prospects in the right moments and at the right places.

Using data like contact preferences, website activity, and order history to formulate meaningful messages across preferred channels can capture interest and intent at scale.

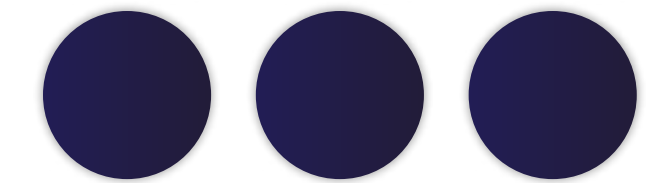
Optimize

Optimize fluid experiences across touchpoints

Optimization is about probing your data in order to pave the way for smooth, seamless, and unified engagements with your customers. Then you can unlock many hidden opportunities.

A single customer view provides you with the bigger picture – who your customers are, what they like and don't like, what they view and buy online, plus much more. Use this data to expand your customer relationships. After you've put your data to work, through micro-segmentation and persona messaging, you can report on your results and continue optimizing in a way that's best for your customers.





B2C optimization tactics

Have the right tools for the job

Maximizing customer value takes a lot of data crunching. It's important to have powerful and robust tools in place to get the most out of your insight. Dominating data practices means anticipating, not meeting or even exceeding, customer needs.

Analytics like customer persona modelling can help you pre-empt trends, putting your business ahead of the competition. Which customers need nurturing? Who buys consistently but spends little? From which segment can you extract more value? The answers to these questions are easier than you think.

Once you know who's who, and who has a propensity to buy what, you can target them with a uniquely tailored message. This could be in the form of an email or ad that includes the product recommendation(s) individual customers are most or next likely to buy – based on everything from email data to purchase history and browse behavior.

Once you've acquired new customers the last thing you should do is forget about them. While many brands focus on new business, neglecting existing customers can cripple company revenues. **The real work begins after conversion: nurture every customer to prevent them from lapsing.**



Stand out in a world of choice

Don't forget that customers can easily go elsewhere thanks to a busy marketplace offering an abundance of choice. Nurturing customers successfully depends on the optimization of data-driven practices; engaging with customers on a relevant and personalized basis can convert them from indifferent shoppers to brand advocates.

Each brand will have different parameters, so go with what works best for you. You could, for example, automatically enrol customers onto a cross-channel loyalty program when their average or total spend hits a certain amount.

Likewise, you might prefer frequency criteria: maybe once a customer has made ten purchases, they become a "super-customer" entitled to exclusive benefits. Using data to solidify the customer relationship through cross-channel loyalty is a no brainer for long-term commercial success.



Revive lapsing customers

Finally, if customers become inactive despite your optimized attempts at re-engagement, make one last effort to win them back. At-risk customers should be prioritized for win-back incentives like discounts, exclusive offers and promotions, especially the ones who have spent more with you in the past. Why not ask them to update their preferences? Despite their legacy data, their needs may have changed. Keeping data fresh and clean should always be top of the agenda.



B2B optimization

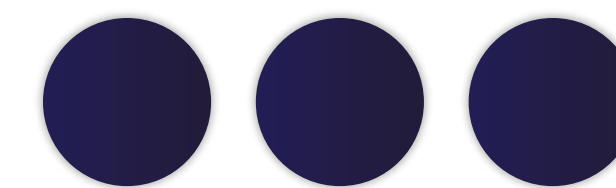
Target your leads strategically

B2B marketing optimization doesn't have to be complicated when you have the right tools in place. Optimized marketing is about precise targeting rather than broadcasting anonymous messages across channels. Data practices should enable this, helping your marketing team understand whom to target, how, where, and when.

Maximize your content

Relevant content should be scheduled at the right time to the right segment, based on preferences, email activity, and industry trends. Tactical tagging on social can also help you identify who responds best to what, by tracking relevant hashtags. Another way to optimize your marketing is prolonging campaign shelf life through affiliate networks; content, for instance, can be shared, re-shared, and repurposed to extend your reach.





Be patient, but proactive

The B2B customer journey is typically much longer than B2C. Orders tend to be worth more, requiring a more detailed decision-making process. B2B brands can optimize their customer marketing to accommodate this lifecycle, using insights to mitigate potential problems, defer tender reviews, and drive renewals or repurchases. Being proactive is key.

Keep the customer journey alive

Make sure you have all the relevant triggers in place to retain your valuable customer base. These could include contract renewal reminders, package upgrades, usage reports etc. Showing customers that their success is your success pays dividends.



Combat churn with clever communications

Churn is bound to occur at some point in the B2B lifecycle. But putting measures in place to delay and reverse decisions to switch provider or supplier buys you time to re-focus on specific customer needs and fix the relationship.

Marketing isn't acquisition-exclusive; use it to reinforce your brand's commitment to existing customers. Use cross-channel automation to communicate, gather feedback, and gauge customer satisfaction. Ask businesses what they want from your brand and listen to what they have to say. Action key data, from survey responses to live chat conversations, to prevent customers slipping away.





Data-driven marketing for maximum conversions

Navigating the five steps to business success isn't a straightforward path. But it can be an easier, faster walk with a powerful cross-channel marketing automation platform that can empower you to use your data to convert more customers.

Growth not only depends on interested customers and appealing brands, but the data and the tools in the background. Marketing teams that can handle data confidently will be able to drive exceptional customer experiences, giving their brand the edge.

Becoming a data leader will empower your brand and business, revolutionize your customer's journey, and boost loyalty in the long run. Once you achieve your growth, conversion, integration, retention, and optimization goals – you'll be an unstoppable force.

Discover what your data can do

Dotdigital turns data into invaluable insights with ease. You can tap into every interaction and unlock the intent behind every engagement to deliver relevant and conversion-driving marketing messages. Check out a quick demo to discover how.

Watch now

