

Customer Profile Management: Optimizing Customer Experience & Engagement

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EXECUTIVE SUMMARY

Marketing success has universally rested on a single principle: “Know Thy Customer.” The increasing need for personalization, localization and customization of marketing campaigns depends on it. However, without a unified and current Customer Profile, critical B2B campaigns like demand generation, lead management, scoring and nurturing are woefully inadequate.

To succeed in the multifaceted communication environment presented by the web, mobile and social media, modern marketers need to embrace a new paradigm for creating and managing Customer Profiles. This new paradigm is known as Customer Profile Management.

This How-To Guide is designed to provide marketers with the information and resources they need to effectively manage their users’/customers’ online experiences based on leading-edge customer profile management and registration systems and strategies.

PROFILE MANAGEMENT OPPORTUNITY & CHALLENGE

Customer profiles are central to effective digital marketing. The rise of Big Data, social sharing and social selling tools offers the opportunity to collect increasingly more detailed information about prospects and customers. That opportunity also presents some key challenges and questions.



Among them:

1. What data should be collected?
2. When and how should it be collected?
3. How should it be stored, managed and accessed?
4. Once collected, how should it be used for more effective marketing?
5. Most importantly, how can it be used to enhance the customer's experience and engagement?

The answers to these questions form the basis of an effective Customer Profile Management strategy.

BEST PRACTICES FOR PROFILE MANAGEMENT

The leap from collecting basic profile data for marketing purposes to developing a Customer Profile Management strategy that enhances engagement can be a big one depending on the maturity of your organization.

The first step is a mind shift from thinking “customer data” to focusing on Customer Profile Management. Customer Profile Management is based on strategies for acquiring new users and understanding their interests, activities and behaviors intimately so you can create unique, personalized experiences to engage with them.

Two considerations are critical to effective Customer Profile Management – **initial registration** and **on-going authentication**.

- Customer Profile Management begins with the prospect's first visit to your site. That **initial registration** is a critical entry point in the customer experience. How quickly does your site engage the first time visitor? The goal is to engage them deeply enough that they want to register with you to learn/get more. So you want to make the registration process as easy as possible.

It's no surprise that the more complex the registration process is, the fewer sign-ups you will receive. That means your organization needs to have a well-designed registration system that captures the information you need while providing a



convenient, easy experience for the user. It should also take into account privacy concerns by balancing the marketer's need to know with the user's desire for privacy.

- The second step is **on-going authentication**. The system must identify the returning user quickly and conveniently. On PCs that is typically accomplished via “cookies”. However, as users increasing log-on from phones and tablets, new techniques for on-going authentication are needed.

Your site's registration system must handle both initial registration and ongoing authentication with ease. Use the following criteria to evaluate or build your online registration system. The registration system should:

- **Be seamlessly integrated with your site.** This includes the branded look and feel of the registration page, forms and user profiles.
- **Provide universal access.** Your online registration option should be readable and easily fillable from any device. It should ensure that the registration process is the same experience on a PC, tablet or Smartphone.
- **Provide “instant gratification” for the user.** The user should receive what they registered for immediately after completing their registration within no more than a minute or two and, preferably, with only one or two clicks.
- **Ensure data integrity.** Elements, such as password management & reset capabilities, email verification, in-line field validation, CAPTCHA bot prevention, etc., must be incorporated into your registration system.
- **Enable customization.** The back-end data management component of your registration system should be flexible enough to allow your team to customize the user registration experience in order to support your brand, marketing goals, sales requirements and/or customer service needs.



BEST PRACTICES FOR ONLINE REGISTRATION

We recommend two best practices for online registration – **make it as easy as possible** and **give users control over their profile data**.

- **Make it as easy as possible.** As stated earlier, the easier and faster the registration process, the more effective your Customer Profile Management strategy.

Today, options, such as Social Log-in, Single Sign-on and Account Mapping offer the best, and most secure, registration experiences. Here we discuss these options in more detail:

- **Social Log-in** – is the process of allowing users to log-in to their account using one (or more) of their social profiles (Facebook, Twitter, Google, LinkedIn, Yahoo!, etc.). This allows the user to register with one click and, in many cases, grants the application access to the user's social data, activity and log-in. This process gives the marketer access to detailed information about the user's interests, activities and preferences.
- **Single Sign-on** – is the process of allowing users to access different parts of a site or connected sites with a single identity, rather than forcing them to sign-in at multiple access points. Single Sign-on enables users to navigate the web more freely. It allows the organization, brand and its partner sites to offer a unique, personalized experience for each user on the very first visit. To maximize the value of Single Sign-on, make sure your Single Sign-on application supports both Social Log-in and traditional user name/password sign-on options.
- **Account Mapping** – allows users to log-on their account with any of their preferred social identities, not just the first one they chose. The user gets increased flexibility; and the marketing organization gets the permission to collect and integrate customer profile information from multiple social sites. This gives the marketer a broader and deeper customer view for the more personalized engagement that today's users expect.



These registration options provide the following benefits:

- **Speed** – Social Log-in provides access with just two clicks.
- **Convenience & Flexibility** – Social Log-in is the most convenient way to complete both initial registration and on-going authentication. Account mapping lets users log-in with multiple IDs, which gives them added flexibility and convenience.
- **Ease of Use** – Single Sign-on provides easier authentication across a range of devices.
- **Security** – Social Log-in is more secure because you are using the data security supported by the company behind the social log-in ID (Google, Facebook, LinkedIn, etc.).

All three registration options provide the added benefit of being considered **authenticated data**. Since the information in social profiles is shared real-time with family, friends and colleagues, it tends to be accurate and current. This is user-authenticated data verified by their social activity, which gives the marketing organization a stream of current, accurate data that they may not otherwise have access to.

- **Give the users control of their online profile.** Users will be less concerned about giving your organization access to their social profiles if they know they have control over it. Enable users to choose public/private options for each personal detail/field on their profile and make it easy for them to change it.

USE CASE SCENARIOS

Customer Profile Management is most valuable for B2C and for B2B companies that support large networks or user populations. These include:

- Real Estate brokers
- Medical suppliers to doctors, dentists and veterinarians
- Employment agencies



- Consumers looking for access to exclusive content
- Consumers looking for access to coupons or special promotions

USE CASE SCENARIOS

As noted, effective Customer Profile Management involves data collection, storage, access and use by the marketing organization to enhance user experience and engagement.

Data Collection Considerations

Through Social Log-in, marketers now have access to rich, experiential data beyond the standard demographic data traditionally collected. This data can include activities, hobbies, interests, relationships, professional networks & connections, job history and financial background. This type of data was difficult, if not impossible, to capture previously without asking users to fill out lengthy and intrusive profile forms.

The value of this data is that it is collected with the expressed permission of the user and provided as they give the organization access to their profiles. When a user is offered the ability to map their account as well as Single Sign-on, the organization can collect information from multiple profiles that can be synthesized and cross-referenced for multiple marketing purposes.

Progressive Profiling

Progressive profiling is a data collection method in which the organization requests additional information from users at specific trigger points in their activity with the website. Progressive profiling can be designed to collect additional information each time a user logs in, or be based on their previous activity/interest. It can also be tied to specific information requests for downloads, discounts or other incentives to increase conversion rates.

Progressive Profiling offers the advantage of building trust and deepening the customer engagement at the rate that each customer feels is most comfortable for them. It gives the marketer the ability to build a composite user profile from multiple data points and sources.

Access Considerations

Access considerations must recognize that users in both B2B and B2C settings are logging on to their accounts via phone and tablet. This can be frustrating as PCs remember their log-in but the “smart” devices do not. A registration system that includes a Social Log-in feature for



mobile devices eliminates the frustration and provides convenience. Increasingly, for business users, log-on IDs can include options beyond social IDs, such as the users' salesforce.com ID.

Marketing Campaign Considerations

Access to social data gives the marketing organization the ability to improve the personalization and customization of all of their digital marketing campaigns. Among the benefits offered are:

- More effective customer/market segmentation
- Increased conversion rates
- More personalized offers
- Channel partner upsell/cross sell opportunities
- Real-time offer triggers
- Deeper brand connection
- Higher share of wallet
- Retargeting optimization

Beyond Marketing

The data collected via your online registration system should not be silo'd in marketing. Your processes and the Customer Profile Management system you choose should enable easy access and sharing of data across all departments including sales, operations and product development.

PLATFORM SELECTION CRITERIA

The Customer Profile Management platform your organization selects will help determine the quality of your online registration and the user experience. Evaluate the potential solution and vendor according to the following criteria:

1. Platform supports all types and levels of registration including user name/password, Social Log-in, Social Sign-on and Account Mapping.



2. Platform comes pre-loaded with templates for registration screens, registration forms and user profiles.
3. Platform allows easy customization for branding all templates, forms and registration pages.
4. Platform offers Registration as a Service (RaaS), complete cloud-based functionality.
5. Platform is optimized for mobile device registration, using responsive design and SDKs for screens, forms and user profile pages.
6. Platform offers advanced data collection options such as Progressive Profiling; Auto-refresh, which updates the user profile at every login, and automatic updates to terms of service.
7. Platform offers APIs for data integration with internal database systems such as CRM, MA, email and ecommerce systems.
8. Platform offers a comprehensive and customizable workflow process for the collection, storage, access and use of all customer profile data.
9. Platform ensures data integrity and accuracy in the collection of profile information with built-in rules for data and email validation.
10. Platform includes reporting and analytics functionality that enables the marketing organization to measure value and optimized usage through features like social login and sharing trends and behavioral analytics.

ACTION PLAN

1. Perform an evaluation of your current Customer Profile methodologies and processes to see how they stack up to the evolving needs of users who want to access your site.
2. Perform a needs assessment across the organization to determine your data collection needs and to identify strengths and gaps to be filled.



3. Use the Platform Selection Criteria listed above to evaluate potential Customer Profile Management partners.
4. Choose the platform that will enable your team to do more with your online registration to enhance the experience and engagement of your users.

BOTTOM LINE

Marketing success has universally rested on a single principle: “Know Thy Customer.” **Advances in Customer Profile Management through technologies like Social Log-in and Single Sign-On have made it possible for marketers to know their customer better than ever -- with the customers’ willing permission.** If your organization has not evaluated Customer Profile Management solutions before, now is the time to give them a serious review.

ABOUT THE RESEARCH ANALYST



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Her specialties include: brand strategy, brand development, customer acquisition and relationship development, content and digital marketing strategy and social media marketing.

ABOUT THE SPONSOR

In late 2004, Founder Larry Drebes and a few engineers began working closely with the early proponents of the OpenID protocol to provide a simple way for companies to solve this problem. Their work laid the foundation for **Janrain** and what is known today as social login.

Today, the **Janrain** Customer Profile Management Platform makes it easy for companies to truly know their customers and personalize every interaction. **Janrain** helps you recognize customers across all devices and collect accurate customer profile data to personalize marketing initiatives.

