FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers

Processes: The Digital Intelligence Playbook

by James McCormick
October 18, 2016

Why Read This Report

Competing for empowered customers and keeping up with their shifting digital expectations means that firms must always be evolving their digital experiences. This is only achievable through a digital intelligence process that uses customer data, analytics, and insights to continuously optimize digital interactions. This report defines continuous optimization and describes the strategies that customer insights (CI) pros can use to achieve it.

Key Takeaways

Constantly Refresh Customer Understanding To Meet Customer Expectations
In the digitally fueled age of the customer, consumer needs and wants keep changing. To keep up, CI pros need to take every opportunity to update their understanding of their customers with fresh data collected from interactions.

Use Continuous Optimization To Refine Your Customer Interactions And Experiences
Continuous optimization is an approach that uses every opportunity to update customer understanding, optimize interactions, and refine the customer experience.

Assess Your Firm's Continuous Optimization Skills Based On Two Dimensions
Consider two dimensions — the breadth of your optimization techniques and the proportion of customer interactions optimized — to determine your strategy and your road map.

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with Gene Leganza and Emily Miller
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Table Of Contents

Notes & Resources

Forrester interviewed 15 user companies: AT&T, Digital River, Europcar, Fathead, Humana, Lenovo, L.L. Bean, Lloyds, L'Oréal, Nordstrom, Rockport, Royal Bank of Canada, Royal Bank of Scotland, Shop Direct Group, and Thomas Cook Online. Forrester also interviewed the following vendors: Adobe, BlueConic, Ensighten, Google, HiConversion, HP Optimost, IBM, Maxymiser, Path Intelligence, Qubit, ResponseTap, Tealium, Webtrends, and WirelessWERX.

Related Research Documents

How Smart Are You At Delivering Digital Customer Experience?

Instrument Your Business With Digitally Intelligent Measurement

Optimize Customer Experiences With Digital Intelligence

FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

Digital Expectations Continually Shift — And CI Pros Need To Keep Up

As customers' digital interactions with brands have grown, the age of the customer has unfolded — an age in which customers, not brands, hold the balance of power. No matter how embedded your brand is in your customers' lives, the many ways customers have to digitally interact with your competitors have made it easy for them to consider and consume their products and services — and move on should they not meet their expectations.[1]

What's more, the proportion of digital to nondigital customer interactions will continue to increase. As it does, customer expectations and the data that firms collect during these interactions will grow and evolve in ways that will both challenge and reward insights-driven, customer-centric organizations.[2] In response, CI pros have developed modern analytics approaches like digital intelligence (DI) and have started to organize customer data and analytics to deliver optimized digital interactions and experiences.[3] However, because customer expectations and needs are constantly shifting, CI pros can't stand still.[4] They must continue to:

› **Elevate their digital intelligence practices.** Modern approaches to digital analytics are pervasive, but CI pros must continually upgrade their strategies, investments, and practices to assimilate new digital channels — such as the adoption of the internet of things (IoT) and the digitization of the physical environment — and the new types of customer interactions and increased complexity they bring.[5]

› **Constantly refresh their customer understanding.** Customers' propensities, behaviors, and preferences are continually evolving, so DI practices must constantly refresh their view of their customers with new data and insights and guide their experiences within digital interactions.

› **Refine the experiences they deliver within interactions.** With refreshed customer understanding comes the realization that the current experience your interactions deliver may not be optimal. Using the most up-to-date view of the customer available, CI pros must target the most appropriate experiences possible within digital interactions.

Continually Optimize And Enhance Customer Experiences

To continually refine the customer experience (CX), you must seek to optimize every single customer interaction by delivering the most appropriate content, offer, ad, or even interactive functionality for that client — all at the right moment and within the right context.[6] To support this imperative with data, analytics, and actionable insights, Forrester defines the practice of continuous optimization as:

A data-, analytics-, and insights-driven approach that seeks to leverage every customer interaction to evolve the understanding of the customer in order to adapt and optimize customer experiences.

FOR CUSTOMER INSIGHTS PROFESSIONALS

October 18, 2016

Continually Optimize Experiences To Differentiate And Compete For Customers
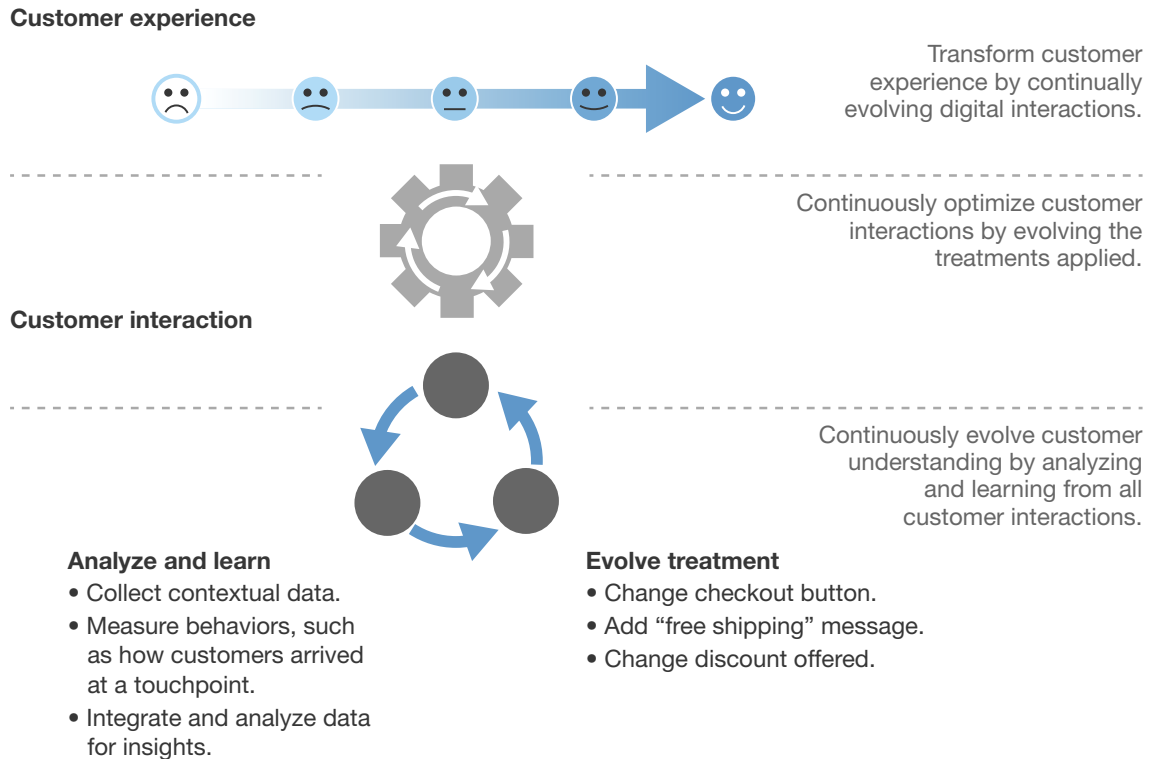Processes: The Digital Intelligence Playbook

Continuous Optimization Is Always Enhancing Customer Understanding To Transform CX

While digital intelligence provides the strategic framework for using analytics to optimize digital interactions, your ability to keep up with customers' changing preferences and expectations and to deliver competition-beating experiences will remain out of reach unless you adopt a proactive approach that continuously optimizes customer interactions. How (see Figure 1)?

› **Refine customer understanding using every new insight.** As customers interact with digital touchpoints, CI pros must take every opportunity to measure their behaviors, such as how the customer arrived at the touchpoint (e.g., organic search, paid search, or email campaign) and what she did there (e.g., time on page, views, or clicks). They must also collect relevant contextual data, such as location, current weather conditions, or current physical activity. By updating and analyzing existing customer information with these new and existing data points, CI pros gain new insights.

› **Optimize customer interactions continuously by improving treatments.** With these new insights, CI pros can refine and improve the treatments they deliver in future customer interactions. You can analyze and modify a nearly infinite range of treatments — from changing the size of the checkout button to adding a "free shipping" message to providing (or not) PayPal capabilities or a combination of all these. These are small examples of optimizing the checkout funnel; treatments within interactions across the entire customer life cycle are up for grabs. You can iteratively optimize interactions by constantly refining treatments within a perpetual loop of interaction.

› **Transform CX by optimizing individual interactions.** The overall experience that customers feel they have with your firm — from the specific types of engagements, such as purchasing or using products or seeking support, to their impressions of the brand overall — is largely governed by the sum of the individual interactions that they have with you.[7] By continuously optimizing these interactions from one contact point to the next via an ever-evolving understanding of what customers want, you can create overall experiences that provide competitive advantage in the age of the customer.

FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

FIGURE 1 Improve Customer Understanding To Continuously Optimize Interactions And Experiences

Customer experience

Transform customer experience by continually evolving digital interactions.

Continuously optimize customer interactions by evolving the treatments applied.

Customer interaction

Continuously evolve customer understanding by analyzing and learning from all customer interactions.

Analyze and learn
- Collect contextual data.
- Measure behaviors, such as how customers arrived at a touchpoint.
- Integrate and analyze data for insights.

Evolve treatment
- Change checkout button.
- Add "free shipping" message.
- Change discount offered.

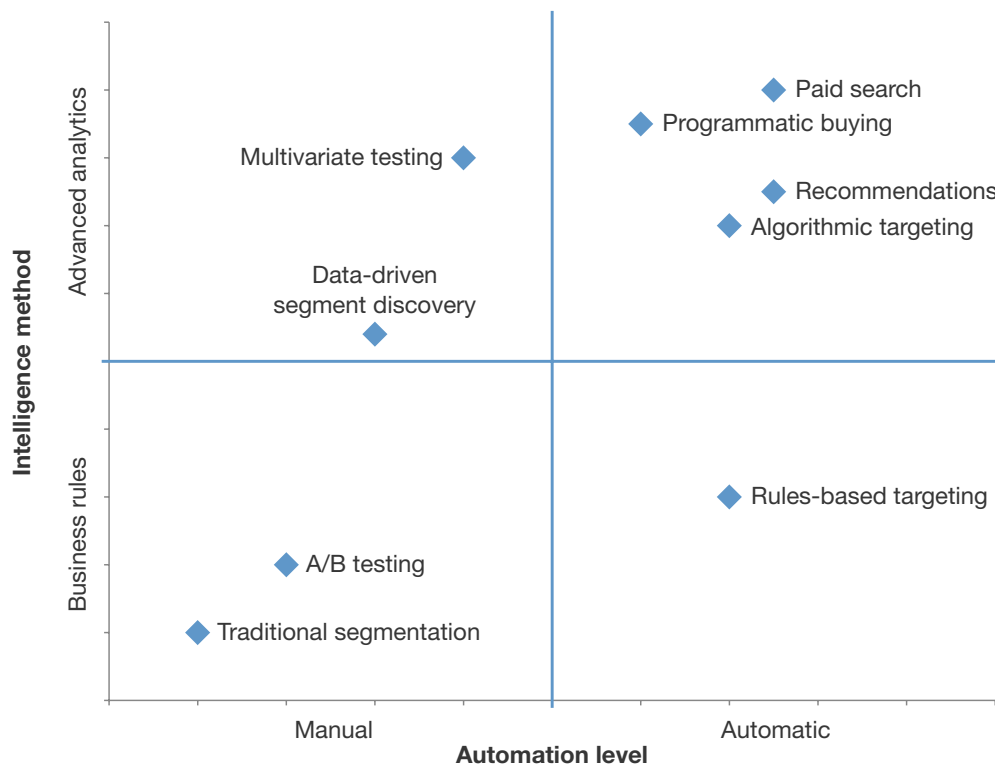## Continuous Optimization Techniques Range From Machine Learning To Manual Approaches

As the ways in which customers can digitally interact with brands have expanded, so have the techniques for optimizing those exchanges using their data-derived insights. The result? No single insights-driven technique can currently deliver complete continuous optimization on its own. To help CI pros make sense of these approaches, Forrester categorizes data-driven optimization techniques according to their level of automation when applied to customer interactions and the type of intelligence used to inform the interaction (see Figure 2). There are two types of approaches:

› **Rules-based intelligence uses preexisting customer segments.** A rules-based approach typically takes the form of: "If the visitor performs the following actions, then serve offer/test variant x."[8] Optimization techniques in this category range from more manual techniques like A/B testing to more automated rules-based targeting. Regardless of the level of automation, these techniques usually rely on preexisting customer segments, such as the visitor's location (based on IP address), campaign origin (e.g., paid search, email, and organic), or a slightly more complex mix (e.g., visitors from Florida searching for flights to Boston).

FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

› **Machine learning uses advanced analytics to make predictions.** CI pros use advanced analytics to create more precise and relevant customer interactions targeted at microsegments or individuals.[9] Optimization techniques in this category range from those that require extensive and ongoing manual operations to more automated cognitive computing capabilities, driving algorithm-based behavioral targeting, paid search, programmatic buying, and product recommendations. Regardless of the level of automation, advanced analytics relies on data-driven segment discovery and experience refinement, which are either manually driven or automatically calculated and applied using machine learning algorithms.[10]

FIGURE 2 Customer Interaction Optimization Techniques

For Maximum Coverage, Optimize Interactions Across Channels And The Life Cycle

Continuous optimization demands that CI pros apply data-driven optimization techniques to every single digital customer interaction. To support this, you should assess your firm's current state of continuous optimization and then plan a road map for more pervasive coverage. Do this by:

FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

> **Examining interaction channels for optimization gaps.** To be truly customer-obsessed, you must use DI to track, measure, and optimize customer interactions within and across every digital channel.[11] Today's digital analytics practices are siloed and focus primarily on channels like fixed websites. This perspective fails to incorporate channels like the mobile web, mobile apps, email, video, and social channels as secondary priorities.[12] CI pros must now design their continuous optimization road maps to target interactions in and across all digital channels through which customers are engaging — whether they are on web pages or not.

> **Evaluating which parts of the life cycle are optimized — and which aren't.** You must also use DI to strategically drive interactions across the entire customer life cycle.[13] Most firms have gaps in customer understanding across large parts of the life cycle, as digital analytics practices mostly focus on tracking and optimizing customer interactions in the early part of the life cycle, such as marketing acquisition and conversion programs, at the expense of interactions in the later phases, such as in-product/service analytics and support.[14] Today's CI pros must redress this imbalance by building optimization practices that target customers when they're engaging at all phases of the customer life cycle.

Continuous Optimization Is Set To Take Off But Needs Some TLC

To assess how the approaches, techniques, and tools for optimizing customer interactions have matured, Forrester interviewed 31 CI pros about their approach to digital analytics and optimization. Our research indicates that CI pros have made a significant start, but they aren't maximizing the full potential of continuous optimization:

> **Analytics and optimization efforts are too simplistic.** Today, optimization approaches in most digital analytics programs focus heavily on running three or four A/B/n programs quarterly. CI pros constrain the scale of optimization programs with their limited use of sophisticated advanced analytical techniques, such as multivariate testing, algorithmic-based targeting, and advanced segmentation — all of which are needed to increase the rate of optimization. The head of online experience at a large European brand concluded that this is due to a lack of the big data needed to scale programs, stating that, "Because each site alone does not get a huge amount of traffic, we need to run tests for as long as three weeks before we know which treatments are optimal."

> **Programs optimize campaigns, not customer interactions.** Many CI pros are using their teams' analytics skills to optimize marketing campaigns. They focus on key performance indicators (KPIs) like traffic volumes, cost-per-click, and response rates, but they must pay more attention to customer-focused success indicators, such as time on site, content consumption, and lifetime value.[15] CI pros need a balanced mix of metrics. Forrester has interviewed a number of financial services firms that spend the largest portion of their digital market budget on programmatic buying. They have found that by increasing their efforts to target customers acquired through these marketing campaigns with more relevant digital experiences, they can see a marked improvement in KPIs like credit card and loan application rates.

FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

› **Optimization programs are blind to parts of the customer life cycle.** Unique customer insights are now key to delivering truly continuous optimization in the often neglected phases of the customer life cycle — use, ask, and engage.[16] CI pros should extend their programs to these later stages by enhancing customer support, informing product and services development, and delivering new products and services using data-driven optimization techniques. For instance, the car insurance industry has begun using driver behaviors to provide flexible or even real-time pricing; insurers can dynamically alter a driver's premiums based on her most recent driving behavior.[17]

› **Linking analytics and optimized actions is hard without a strategic approach.** To achieve successful optimization using analytics, CI pros need a holistic strategy that combines multiple technologies and data types. Yet such strategies are generally immature.[18] The result? Poor integration between analytics and optimization tools inhibits the ability to deliver enhanced customer experiences at scale. Despite significant investments in web analytics, testing, and behavioral targeting technologies, a North American financial services firm is floundering due to a poor vision and weak strategy. Its analytics, online testing, and personalization practices operate in silos and with separate agendas — and fail to deliver continuous optimization.

Leading Optimization Practices Show The Way

For many CI pros, continuous optimization remains largely aspirational. But there are examples of programs that are well on their way to optimizing a large proportion of their customer interactions and thereby driving significant business value through improved customer experiences. Successful firms show that:

› **Good organization jump-starts optimization efforts.** CI pros may believe that they will need to invest heavily in extra people, skills, and technology before they will see significant benefits. But a simple reorganization and a realignment of existing resources may be all they need to get started — a fact not missed by Giles Richardson, head of direct banking analytics at UK-based retail bank Royal Bank of Scotland (RBS).[19] Instead of having the analytics team do all the heavy lifting within optimization programs, the team pivoted to support and enablement and then partnered with and trained approximately 50 of the bank's journey managers. These journey managers — referred to as "Superstar DJs" — were given new skills and access to test and learn the technology so that they could manage and run many of their own optimization tactics. The result? Overall, optimization accelerated from two to 70 tests per quarter in less than a year, and Giles saw the value of optimization for the business delivered through conversion uplift and other KPIs almost triple within the year.

› **Executive support delivers success.** Continuous optimization, by its very nature, is an enterprise initiative that requires investment in technology, skills, and processes, and getting buy-in isn't always easy. Without executive support, optimization programs will remain siloed and tied to specialty programs within marketing and eCommerce. But Jonathan Wall, UK group eCommerce director of UK online retailer Shop Direct, told us that his team exhibited significant success after

FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

the company made personalization a key corporate strategy, mandated from the top down. This top-level support is paying off: A vibrant company culture of "experimenting on everything" and "iteratively fail fast and learn" has led to an aspiration of changing nothing on the company's digital touchpoints without experimenting first. As well as running an impressive 60 to 70 tests a month, Shop Direct has a very active targeting program.

› **Even late starters can gain early benefits.** While many companies have fallen behind the data-driven optimization curve, they can still gain rapid benefits from simple tests and use these to create larger and more strategic optimization programs. Business partners find these initial small prototypes and pilots tend to swiftly deliver value and thus invest further. Jen Towns, vice president of marketing at AOL, built up an extensive online testing program from scratch in less than a year while director of retention marketing. She started by proving significant uplift in KPIs after running a few simple tests with very limited resources.[20] The demand from her colleagues grew rapidly, and budget holders allocated more resources as the business case became clear.

Recommendations

Grow Continuous Optimization Within A Digital Intelligence Strategy

Forrester's vision for digital intelligence — a modern approach to digital analytics — seeks to create a holistic view of the digital CX required to execute optimized customer interactions.[21] Rather than make continuous optimization stand on its own, CI pros must integrate it into their DI vision and strategy. To grow your continuous optimization capability, incorporate these DI best practices:

› **Start by squeezing extra continuous optimization value from what you already have.** Don't rush off to your executive management team and overwhelm them with your reasons for huge budgets and change programs. Instead, take stock of what you have and use it better. Take a page from RBS's Giles Richardson and focus on reorganizing existing resources to significantly boost your test-and-learn activities and the value of the optimization program as a whole. Showing early value makes it easier to get approval for more resources.

› **To scale continuous optimization, start small.** Simple optimization approaches, such as A/B testing, can deliver targeted and tangible value within weeks. CI pros seeking significant investment in these practices should partner with their marketing, eCommerce, and product management colleagues to deliver short-term, high-value pilots. Then use the output of these to justify the more significant investment needed to scale the practice and deliver true continuous optimization. Jen Towns of AOL started with a few simple tests that proved their value, which she then used to justify future investment.

› **Use segmentation to target optimization tactics.** CI pros who neglect to segment their audience prior to applying optimization techniques often fail — particularly if they alienate their most valuable customers by treating them like everyone else. Before rushing to optimize your interactions, start

FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

your program by listening. First, measure and analyze the behaviors of digital visitors and the context of their engagement so you can create digital segments that are relevant to your business. Then use these segments within optimization tactics like targeting tests and personalization efforts and report the impact of these tactics for each segment.

› **Take an iterative approach to optimization.** By their very nature, the test-and-learn algorithms baked into many optimization methods rely on learning from failures. For instance, when a digital visitor doesn't respond well to a particular offer, optimization algorithms will account for this during future interactions with similar customers and will present another offer. To reduce the risk of brand damage during these early "failed" experiences, make sure that you apply alterations to interactions incrementally and to a small proportion of the audience. If they prove successful, gradually throttle up the delivery. Firms like Shop Direct have embraced the value learned from these small failures.

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FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

Supplemental Material

Companies Interviewed For This Report

Adobe	L'Oréal
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BlueConic	Nordstrom
Digital River	Path Intelligence
Ensighten	Qubit
Europcar	ResponseTap
Fathead	Rockport
Google	Royal Bank of Canada
HiConversion	Royal Bank of Scotland
HP Optimost	Shop Direct Group
Humana	Tealium
IBM	Thomas Cook Online
Lenovo	Webtrends
L.L. Bean	WirelessWERX
Lloyds	

Forrester Analysts Interviewed For This Report

Martha Bennett	Martin Gill
Michael E. Gazala	Milan Hanson

Endnotes

[1] To compete in the age of the customer, firms should aggressively pursue customer obsession in the shape of four strategic imperatives: Embrace the mobile mind shift, accelerate their digital business, turn customer data into insights, and transform their customer experiences. See the "Winning In The Age Of The Customer" Forrester report.

[2] Insights-driven business will be generating around $1.2 trillion per annum by 2020, effectively stealing business from their non-insights-driven competitors. See the "The Insights-Driven Business" Forrester report.

[3] Forrester defines digital intelligence as the capture, management, and analysis of customer data to deliver a holistic view of the digital customer experience and drive the measurement, optimization, and execution of digital customer interactions. To learn more about this modern competitive approach to analytics, see the "Optimize Customer Experiences With Digital Intelligence" Forrester report.

FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

4 The complexity and breadth of DI requirements means that firms still have some way to go before their DI practices are fully mature. The way they measure and organize around customer engagement is only just starting to drive customer engagement initiatives at the strategic scale needed for competitive advantage. Forrester provides CI professionals with the maturity model and self-assessment tools needed to determine next steps in the road to digital intelligence excellence. See the "How Smart Are You At Delivering Digital Customer Experience?" Forrester report.

5 Forrester's recent review of digital intelligence assessed practices across the competencies of strategy, technology, ownership, metrics and KPIs, and optimization techniques. We found that most firms have a long way to go to maximize the value of modern digital analytics. See the "How Smart Are You At Delivering Digital Customer Experience?" Forrester report.

6 The context of customers' interactions determines whether they will engage with your brand again. CI practices must be prepared to identify and use context to create a repeatable cycle of interactions, drive deeper engagement, and learn more about the customer in the process. See the "The Power Of Customer Context" Forrester report.

7 Governance is a critical discipline in delivering great customer experiences. Mechanisms to control the design and delivery of customer interactions via digital touchpoints are the key levers for good CX governance. See the "Digital Customer Experience Governance Demystified" Forrester report.

8 Forrester's definition of rules-based intelligence is an extension of its definition of rules-based targeting, which encompasses the practice of leveraging historical, environmental, and behavioral data to inform the delivery of content based on predefined rules. See the "Behavioral Targeting Powers Customized Content And Increased Conversion" Forrester report.

9 Forrester defines advanced analytics as the practice of statistical and/or machine learning algorithms that allow firms to discover, evaluate, and optimize models that reveal and/or predict new insights. Advanced analytics supercharges traditional methods, digging deeper to find patterns or forward-looking insights that traditional analytics approaches may not reveal, such as the probability of customer defection, fraud detection, or cross-sell recommendations. See the "Instant Insight: The Truth About Advanced Analytics" Forrester report.

10 Machine learning has the potential to uncover actionable new knowledge, predict customers' wants and behaviors, and make smarter business decisions. See the "Massive Machine-Learning Automation Is The Future Of Data Science" Forrester report.

11 Digital intelligence is effective for tracking and intelligently interacting with customers across all digital channels. In today's multifaceted digital landscape, modern digital analytics driven by DI strategies must keep pace with customers however they choose to interact with you. See the "Optimize Customer Experiences With Digital Intelligence" Forrester report.

12 Forrester's research into the state of digital intelligence practices found that the vision supporting DI strategies is often incomplete, with programs focusing on one technique or channel. To deliver a holistic view of customers' digital interactions, digital analytics processes must handle multiple channels, multiple devices, and escalating data complexity. See the "How Smart Are You At Delivering Digital Customer Experience?" Forrester report.

13 Digital intelligence is effective across all phases of the customer life cycle — driving traffic for discovery, delivering content for exploration, supporting eCommerce for buying, and reinforcing engagement through customer relationship management (CRM), loyalty, and support. See the "Optimize Customer Experiences With Digital Intelligence" Forrester report.

14 The vision supporting DI strategies is often incomplete, with programs focusing on only one part of the customer life cycle. See the "How Smart Are You At Delivering Digital Customer Experience?" Forrester report.

15 No single metric or source of data can provide a holistic view of customer engagement. To understand and optimize customer engagements, CI pros must collect and analyze a mix of quantitative data across the entire customer experience. See the "Instrument Your Business With Digitally Intelligent Measurement" Forrester report.

FOR CUSTOMER INSIGHTS PROFESSIONALS

Continually Optimize Experiences To Differentiate And Compete For Customers
Processes: The Digital Intelligence Playbook

October 18, 2016

[16] When seeking to plan, manage, and maximize the relationship with their customers, firms should embrace the customer life cycle as a strategic cornerstone; unique customer insights will become key in providing differentiated offers and services across the entire customer life cycle. See the "UK's Multichannel Consumers Demand Customer Life-Cycle Marketing" Forrester report.

[17] The potential of using customers' driving behaviors to optimize insurance premium pricing was discussed by David Williams, managing director of underwriting at AXA, during his presentation for the February 2014 Analytics for Insurance Europe event.

[18] Forrester has redefined the modern practice of web analytics as "digital intelligence." This approach brings a set of expanded requirements and calls on CI pros to consider their technology frameworks to support continuous optimization. Creating an enterprise capability that drives optimized action across the life cycle requires multiple technologies and data sets that must be brought together within a holistic and integrated strategic approach. See the "Decipher The Digital Intelligence Technology Code" Forrester report.

[19] Giles Richardson presented at the 2015 Adobe Summit, where he talked about the application, organization, and management of machine learning, analytics, and test-and-learn approaches within RBS. RBS is one of the retail banking subsidiaries of The Royal Bank of Scotland Group.

[20] Jen Towns, VP of marketing at AOL, spoke of the rapid adoption of online testing at AOL during a joint webinar with Forrester and Adobe in 2013. At the time, Jen was director of retention marketing for AOL's paid services division. Source: "Forrester and AOL discuss the future of testing," Adobe (http://success.adobe.com/en/na/programs/products/digitalmarketing/offers/may/1305-34359-target-forrester-aol-webinar.html).

[21] Forrester defines the modern vision of digital analytics — digital intelligence — as the capture, management, and analysis of customer data to deliver a holistic view of the digital customer experience and drive the measurement, optimization, and execution of digital customer interactions. See the "Optimize Customer Experiences With Digital Intelligence" Forrester report.

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