



All you need to know about personalized
marketing in a digital world

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Everyone predicts that personalization will be among the most popular marketing trends this year and probably for a long time to come.

Yet, 76% of marketers in North American markets describe personalization as basic (so only 1 in 4 companies is quite advanced in this kind of strategy!).

Among these people, 30% say they have no personalization process in place, while 26% simply have no technology to help them personalize their products. ([Dynamic Yield, 2018](#)).

Still, there is hope, since among these 24% of experts (1 in 4) who are able to implement personalization practices, 77% have experienced revenue growth in 2018. This figure is even higher among companies that had an advanced personalization strategy (93%).

So, there is a direct effect between personalization and increased revenue, but also on engagement, satisfaction and loyalty.



These findings may be related to a number of factors, but we know that consumers are ready and willing to receive personalized content. As the Salesforce State of Marketing indicates, 79% of respondents want to share data in exchange for contextualized engagement. In particular, 88% of customers expect personalized offers in return. On top of that:

- 74% of customers feel frustrated when the content of a website is not personalized. ([Communauté Business 2](#))
- 77% of consumers have **chosen, recommended or paid** more for a brand that offers a personalized service or experience. ([Forrester](#))
- More than 78% of consumers take action on an offer only if it is tailored to their previous commitments with the brand. ([Marketo](#))
- Personalized homepage promotions prompted 85% of consumers to buy, while personalized shopping cart recommendations influenced 92% of online shoppers. ([Communauté Business 2](#))



Introduction

[SoDA Report](#)

67% of global leaders who describe their organization as "master" or "expert" with advanced levels of customization, 40% actually use only basic customization tactics once surveyed.

Well, let's just say that this grocery list of statistics shows that most businesses are not able to implement personalization practices, while the lucky ones that do see results that impact their business objectives. This is totally realistic, given people's willingness to get offers that match their interests.

Thus, buyers' demand for a more personalized experience is driving marketers to use and research all available data sources that provide information about the needs and unique personality of each contact.

With this in mind, let's discover the facets of personalization that need to be put in place to go beyond the elementary thresholds of what is currently being done.





You can get a group of four marketers into a room and have a conversation about personalization, and everybody can walk away thinking “Well, that was a super-insightful incredible conversation.” But in reality, the odds are very good that when each mentioned “personalization,” they were talking about different things.

One marketer could be using field insertion to include a customer’s name in an email. Another could be adding recommendations based on what other people have bought. The third one could be adding somebody’s name to a push notification. The fourth could be thinking about an omnichannel connected experience that gets the brand closer to the customer. And they could all be right.



SAILTHRU
Vice President of Marketing,
Jason Grunberg (2017)



What is personalization in a digital world?



Definition

Personalization is the process of **keeping in mind the needs and preferences of your audience in order to market the right product and experience to the right person at the right time**. By doing this, you have a better chance:

- Of having clients that feel heard,
- To have a meaningful interaction with them,
- To encourage them to engage/buy.

In the field of marketing, personalization is not limited to addressing customers by name. This notion is now accepted, as decision-makers are committed to increasing their spending on personalization (32% speak of a significant increase over the next few years).

Therefore, personalization is a strategy, not a specific tactic. It's a lot of different things, and you can constantly improve it.

In 2017, Accenture reported that due to poor customization and lack of trust, 41% of consumers switched businesses, costing U.S. businesses hundreds of millions of dollars.



How is personalization different from customization?

Personalization, as you now know, is about creating a personalized marketing experience for customers. Amazon is a shining example of good personalization, as are Netflix and YouTube, since recommendations are based on user activity.

Customizing, on the contrary, gives the freedom to modify a product or service according to the person's tastes. It can therefore remove, add and modify one or more existing elements (think of Nike who lets you change the colorway of their shoes).

Indeed, in e-commerce, the most commonly used customization technique is product personalization. Buyers design their own clothing and accessories, unique to their style/taste. It goes without saying that the end result of this product increases their level of satisfaction, since it is the fruit of their own work!



Implementation challenges

As the introduction to this white paper indicates, personalization comes with its own set of challenges. Most studies that relay actual company challenges inform us that :

- Budgets are limited,
- The technologies in place are hindering implementation,
- Everything surrounding the data is nebulous. For example, 1 out of 2 marketers indicate that they are not able to push personalization in emails because of poor data integration ([Econsultancy](#)). 1 in 4 marketers refers to data quality ([Monetate](#)).

It is also interesting to note that more than half of the organizations do not have a strategic roadmap and an adequate investment plan in relation to their ability to customize in the medium and long term. [A McKinsey study reports that only 15% of decision-makers felt that their company was on the right track in implementing this strategy.](#)

What about your situation?



Personalization maturity curve

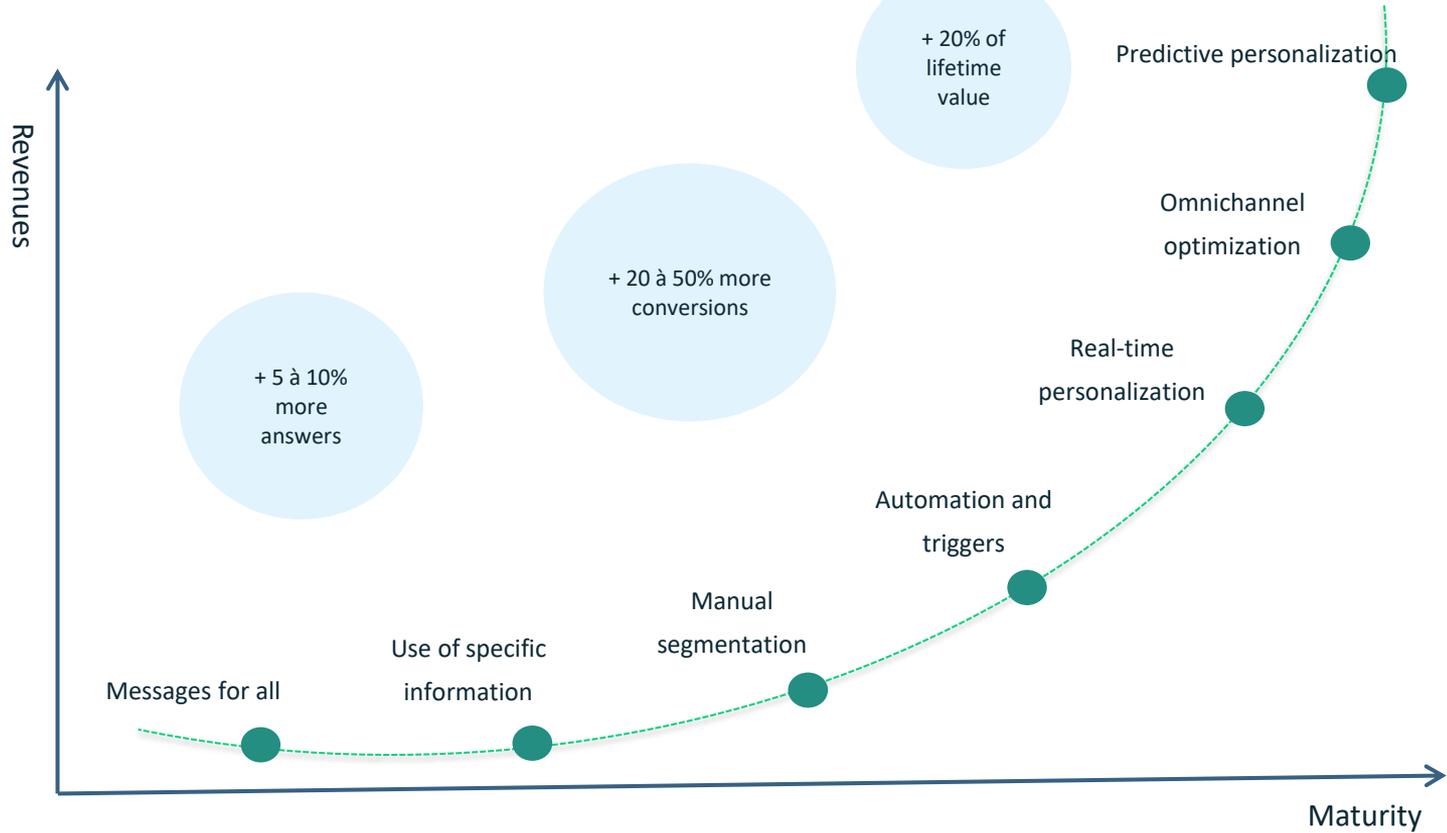
These challenges mean that organizations find themselves in different phases of implementing this strategy ... which is not a bad thing and completely normal! Each organization will have a different level of maturity, and the curve is important to situate itself, but also to evolve better. The level of maturity of a company is mainly based on 3 factors:

1. Data - what **quantity/quality of customer data** do you have at your disposal, but more importantly; how easy is it to access this data, and what are you doing with this data?
2. Capacity - what level of contribution can the organization offer to create this personalized experience, be it **human, technological, monetary, temporal**, etc.?
3. Scalability - what is the scale of personalization that can be achieved based on the existing **digital and technological infrastructure**?

Once mapped, these factors reveal a personalization maturity curve that leads to increasingly specific, precise and measured communications.



Personalization maturity curve



In order to provide communication to...

All

The customer is not subject to any variation in treatment or offer. The content is chosen at the mass level and distributed to all. The process can be considerable work with little return on investment.

Several

The customer experiences the brand across many channels: email, mobile, social media, etc. The experience is not consistent or connected. The rules of the campaign determine the next interaction. A basic segmentation, such as consent, is also taken into consideration here.

Some

Each channel/media has a variation of content based on context and offering. Offers are also aligned on segments divided by predefined models (such as the concept of persona) and basic rules (a simple scoring).

Any

The customer experiences a connection between online and offline communication. The company communicates with the client on an interactive basis, managing several types of automated response mechanisms.

One person

The customer experience is optimized, as is the content on all channels. Communications are defined by reality, through the recognition of the actions/behaviors of the contact, which are delivered in a timely manner, by managing advanced automated response mechanisms.



Getting started with personalization



Where do we start?

Personalization is about creating a continuous connected experience for an individual, rather than for a wide range of customers and segments. It is about being relevant and contextual to that person in specific circumstances.

In this context, all brands can agree on a definition, but when the conversation turns to tactics, what is right will inevitably change from one brand to another.

When it comes to personalization, treating it as a strategy versus a tactic makes a huge difference. Then start there. It's not just about doing something new and testing it. If you view personalization as a strategy, you expect execution and evolution over time. You think about the possibilities in terms of what's coming, and what comes after that. You also have a conversation with the organization's senior management and your counterparts to get a clear picture of the integration steps and improvements that need to be made.

SAILTHRU

Interested in knowing the top 100 companies that do personalization in the retail industry? Discover the most up-to-date [index!](#)



Think overall ...

In addition, you need to look beyond your own department. Personalization affects several key teams, which will help its deployment:

- The IT teams, since they will greatly help you in the use of technology, and data accessibility;
- Your digital and performance analysis teams, who will link the more advanced online elements, while measuring the right ones;
- The product(s) teams, who will help you get the key information to promote;
- The more traditional channel teams, so that campaigns are aligned with each other;
- Point of service or sales teams, who can also have an impact on capturing key information about customers and their behaviors;
- And much more!



To properly plan the business processes that will benefit from being personalized

The issue of customer experience is a cross-cutting one, which means that it must be part of the company's overall objective. By involving more people, it will be easier to get help when it is needed, and people will be better able to respond to requests because they will understand what triggered the request.

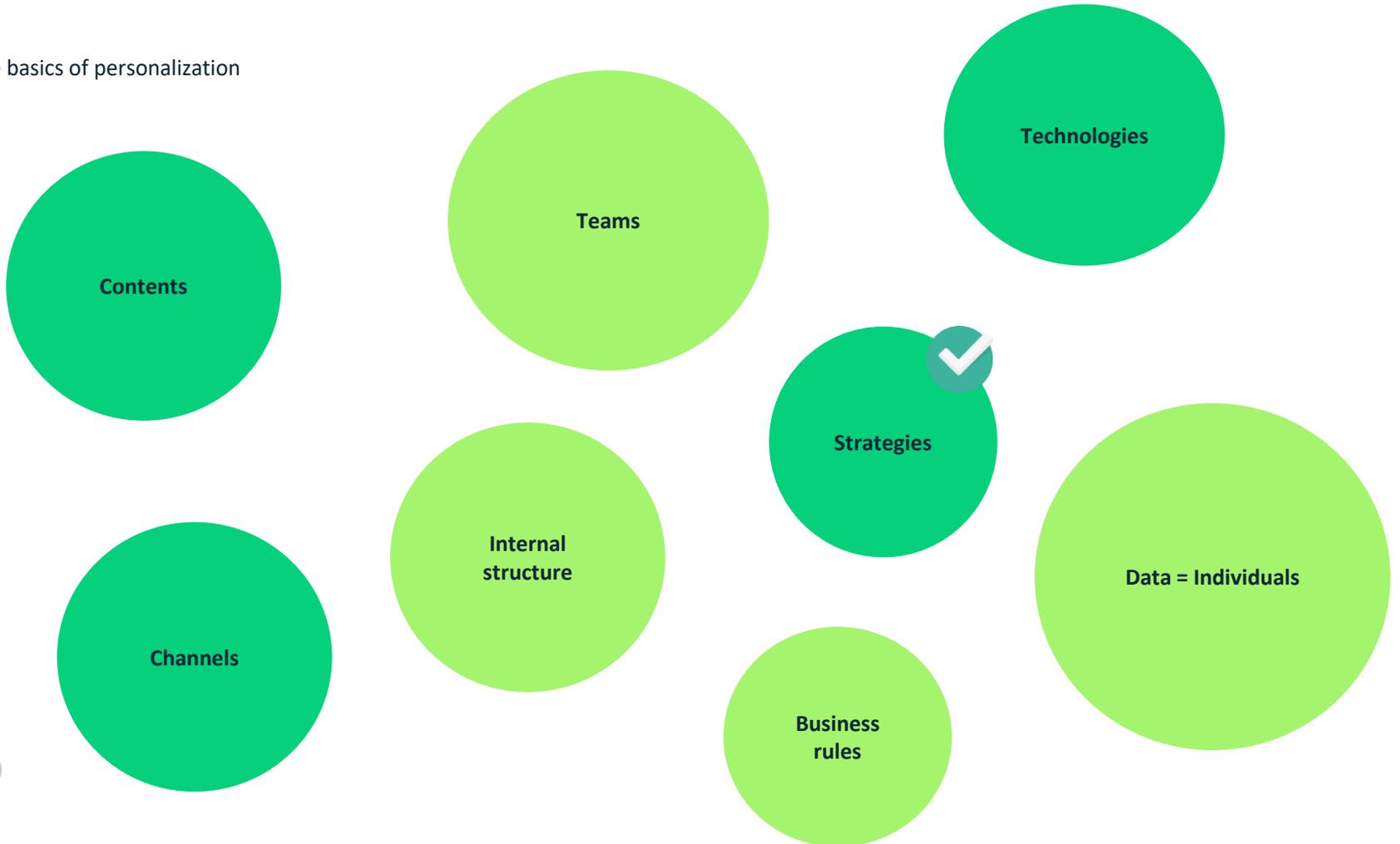
Once the teams are in place, you can begin a personalization plan, which includes:

- **Organizational and departmental goals in this strategy** (e.g., improving the entry of a new customer into the loyalty program).
- **Major projects and worksites** that will be affected by the project (identifying what is missing and what already exists).
- In a temporal perspective where everything will not be possible from the first year, therefore it will be necessary to **prioritize the work sites to achieve this**.

Taking this into account, personalization is only possible by looking at the elements on the next page, which we will cover in the next pages of this white paper.



The basics of personalization



The essentials of personalization

Personalization is often expressed in the following sentence:

Send the right message, to the right person, at the right time, and on the right channel.

But what does this sentence really mean? We hear it too often, and it has become almost meaningless. From a strategic perspective, however, it situates everything that organizations need to assess and implement in order to properly position their personalization strategy.

What?

Anything remotely related to the content being sent.

Who?

The customer is at the centre of personalization, and the data that concerns him or her, at all levels, must be evaluated.

When?

Recognizing the timing of a communication, in the face of several variables that influence it, is paramount.

Where?

What channel is the customer on, where does he come from and what will he do next?



Simplifying concepts



1 Who?

Although the WHO? is placed second in our key sentence, it is definitely the most important aspect of the sequence, and it refers to only one thing: **the data!**

Without data, personalization is not possible, and honestly, not worth thinking about. Knowledge, governance and control over customer data is required in order to implement successful personalization practices.

Brands and agencies are constantly testing new creatives, new technologies, new offers, etc. But can you name the last time a company mentioned to you that they were testing contacts (and their activities), whether they are properly tracked, segmented and activated? There are very few of them, which leads us to believe that most organizations do not take advantage of their primary data to create a true multi-channel marketing strategy.

The question of data is then multiple; it touches on several subjects that need to be covered together.

Jason Grunberg

There are a number of retailers who say, "Personalization is fantastic, we'll get to it once we get our customer experience right." I don't see how you can get the customer experience right without personalizing.



Managing your data

- Segment

Personalization and segmentation, while both valuable to marketers, could not be more different. Segmentation involves grouping customers according to identifiable characteristics. Often these are demographic characteristics such as age, geographic location or gender.

Personalization is the optimization of experiences and messages aimed at the individuals themselves - not the group to which they belong.

Segmentation is a relatively early tactic on what we call the personalization maturity curve, as seen in the introduction.

That's why more sophisticated strategies have a greater impact on revenue and retention, such as personalized recommendations, omni-channel optimization and, ultimately, predictive personalization.

However, there is a close link between **data, segmentation and personalization**. It is much easier to personalize the data when the characteristics of the segments on which it is based are well understood.

A common practice is to first discover and analyze the most valuable and profitable visitor segments and then personalize them. A simple pyramid structure can illustrate the facilitated dialogue between the three elements.



Data, segmentation and personalization

The **upper level** / Personalization - Individual real-time personalization can only be achieved if you have sufficient customer data, know your audience and your most valuable segments.

The **intermediate level** / Segmentation - Once you have collected enough valuable data, you can start analyzing it, looking for interesting correlations between groups.

The **base of the pyramid** / Data collection - The key to segmenting and personalizing experiences is solid customer understanding. The richer your data, the better you understand your audience and the better you can segment and personalize experiences based on that data.

Type of data

Create personalized offers based only on the contact's data, based on his own experiences with the company, offer him tailor-made promotions, and generate recommendations.

Type of data

Create groups based on common interests, traffic sources, form fields, demographics. More advanced would be based on events/actions taken, and behaviours.

Type of data

General - Traffic Sources / Steps to Purchase

Demographics - Location / Age / Gender

Explicit - Consent

Behavior - Click behavior / Time spent on a page / Time between visits / Page views / Purchases



Managing your data (continued)

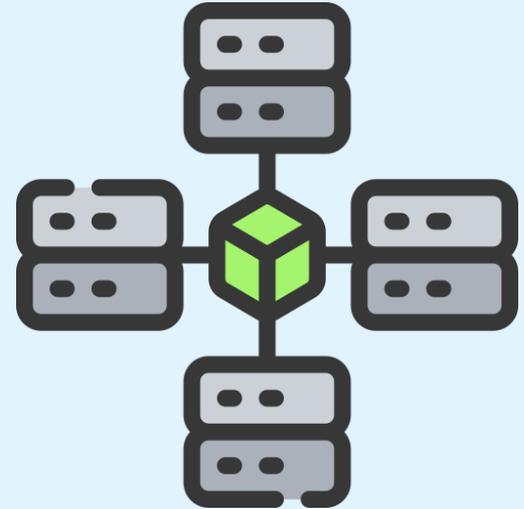
- Centralize data

Personalization in businesses generally suffers from a lack of centralized data capable of recognizing a customer, regardless of the point of entry, in near real-time when needed.

Therefore, a new term and tool has appeared in the last few years to meet this challenge, the [Single Customer View \(SCV\)](#).

Fundamentally, the SCV seeks to unify customer data in a database that persists over time. This is possible because it gobbles up information from CRM, website, call center, marketing applications, and any other system that deals with information about a potential or existing customer.

This is why we talk about a 360 view of the customer.

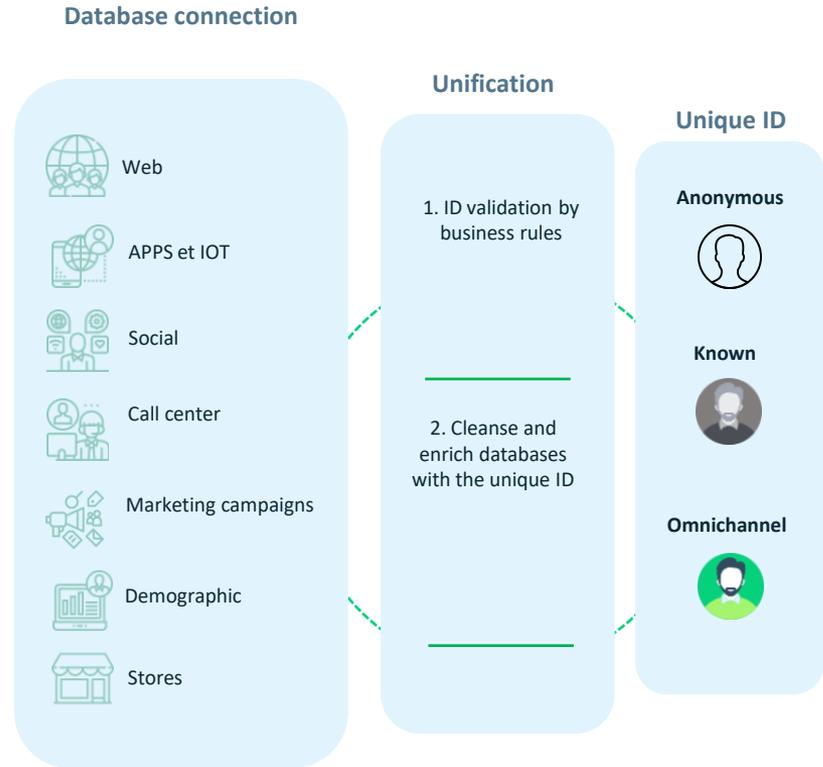


As shown in the diagram, the objective is to continuously optimize and enrich the contact information with precise and planned mechanics.

Having an SCV makes sure that:

- 1. Technology can react more quickly to the actions of a contact: there is no unnecessary information processing time.**
- 2. Decisions that modulate experience are made based on the range of information retained on a single contact: there is no lost or unused information.**

We'll talk later about the technologies that are clinging to the SCV for an ecosystem conducive to personalization.



- Analyze your data

Now that you have a better understanding of the importance of breaking down the silos between departments, teams and channels by consolidating the data, the next step is to analyze it.

Analytics is definitely the last cornerstone for better value creation on data that will be sustainable. The development of this practice should eventually lead to two key competencies in organizations: **analytical processes and methodologies for working with data.**

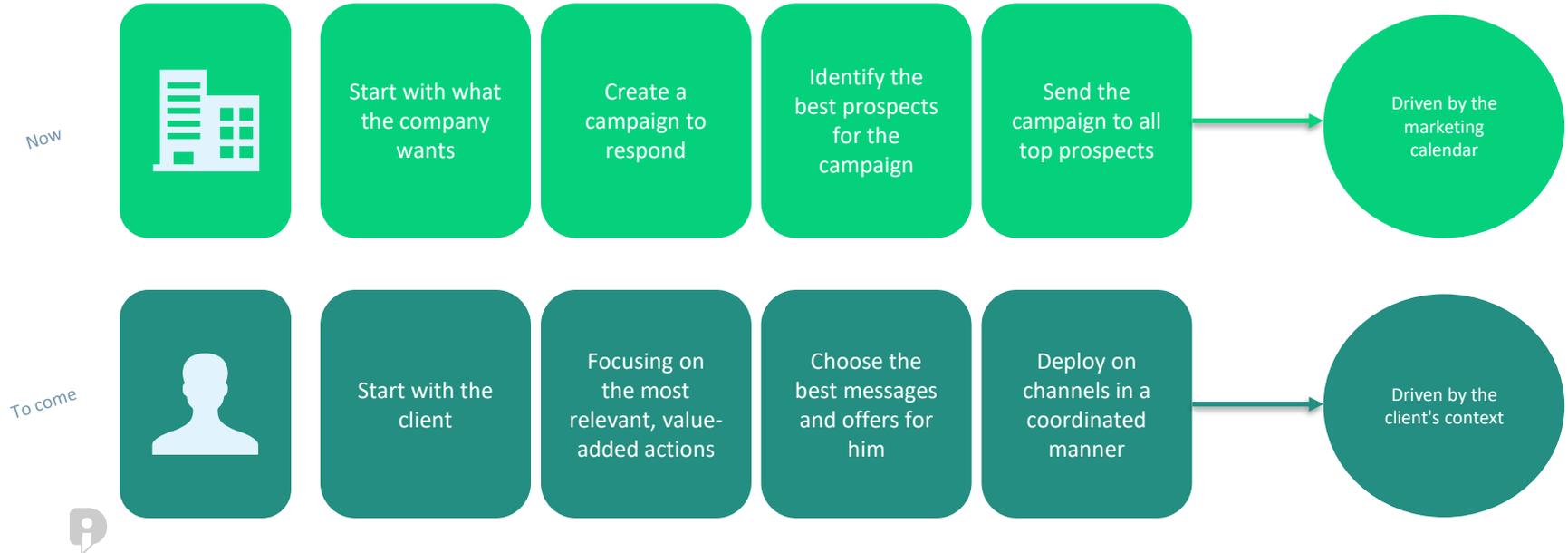
Experimentation, algorithms and of course machine learning are part of the work to be done.

However, full algorithm-based optimization (pressing the button, receiving a response) does not happen overnight; it requires a step-by-step development process that handles ever-increasing complexity.



Changing the initial vision

The goal behind analyzing data to improve personalization is to move away from a pure push approach to one that is much more contextualized and client-specific. But to do this, we need to understand it better, and above all act on that knowledge.



Bringing both of them to life in the right way

This is then the challenge that most organizations must solve: choosing the right sequence and an adequate set of parameters to meet the customer's context, while considering the company's objectives on its marketing calendar. There will always be a portion of the business objectives that will guide decisions, but the customer's place cannot be overlooked.

Looking at those decision-making mechanisms needed for this new vision, they will have to evaluate the other aspects to be covered, namely the content (what), the channel (where) and the time (when). Thus, algorithms, in addition to acting on segmentation and targeting, will also have to make decisions at these levels.

This concludes our section on data and makes a good transition to the second pillar of personalization, which is not easy to master, but which we talk about more often: content!

BCG GAMMA BLOG

Discover an [advanced analysis methodology](#),
and all the technical questions a marketing
analyst should ask himself to face this challenge.



2 What?

Contently

By a wide margin, personalized content is either more effective (48%) or much more effective (32%) than non personalized content.



The WHAT? refers to the personalization of content, which is valuable for marketers striving to engage customers on an individual level. This portion of personalization is not new, far from it.

For years, marketers have focused their personalization efforts primarily on modulating content to match customer profiles. The major difference for a modern approach comes from the fact that it is no longer just a question of visuals or graphics, but rather a systematic approach in the use of customer data, supported by technology to help make the right decisions, and thus push the right thing.

This makes the personalization process more refined and efficient than the mechanisms of the past. There are various tools that can be put in place to improve this practice, and this is what we will cover in the next few pages.

Define the vessel

Template per channel

Channels already define the formats in which you must communicate. Nothing new here. However, you need to change your thinking approach, since it is the “vessel that should modulate the content, not the other way around”. The time it takes to produce a communication must be reduced. Manual work is not possible in systematic personalization; planning time must be eliminated. Formats must be predefined for all aspects that are possible, and the contents must fall within what is regulated.

Brand assets management

In the wake of creating your templates, you also need to think about which of your brand's assets need to be adapted for contacts. For example, your office addresses, URLs, language management, email footers, etc., are all assets that need to be adapted for contacts. It can also be a question of visuals, such as a logo, background colors, etc.

This information should be reflected in all types of communications you send and should be automatically adjusted based on your brand information, which may vary.



Define the content

Dynamic content

Once your vessels are set, you can start placing your information in a thoughtful approach.

The first concept to master is the [dynamic content](#), which is used to modify certain parts of a communication according to pre-established criteria/rules. In this way, dynamic content makes your campaign more relevant to the interests and behaviors of your contacts.

Content calendar

Another essential tool for personalization is the creation of a content calendar to guide you through multi and omnichannel sending.

With Dialog Insight, the calendar is linked to communications that are sent automatically, facilitating this global view.

Timing is essential for commercial pressure, so as not to send too many communications in a short period of time to a single contact.

Connected catalogue

The fifth tool we will cover for content personalization is the catalogue. In order to systematize dynamic content, the content possibilities must be gathered in one place and then be well placed. This is called the connected catalogue.

A catalogue can include several types of information including a product name, an image, an item number ... in short, any information that can be inserted in the communication according to defined fields.



3 When?

The third ingredient of personalization is the WHEN? This element refers to some important questions that will eventually need to be integrated into the parameters that control your personalization, in automatic or predictive mode.

- The sequence order is a key aspect: For example, analysts can spend time understanding whether a sequence A B C D E is as effective as B D A E C, in addition to the other sequences that can be considered (here, there are 25! ... or even less if messages can be excluded).
- Delays between messages: using the example above, what is the best time between B and D, or A and B? At best, with time, it will no longer be just the delays that will determine the next mailings, but rather what the individual does ... or doesn't do! Behaviors will further guide sending decisions, and that's what we cover on the next page.
- Exclusions are also important: it could be that some periods are voluntarily more active while others are less so, more popular days depending on your industry, or even key moments that will be observed by your BI analysts in relation to the behaviors of certain customer segments.



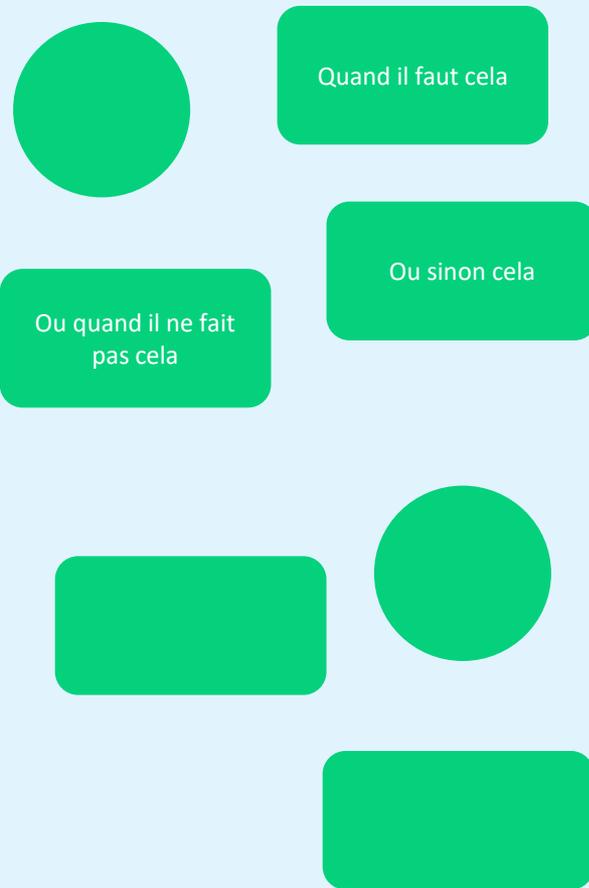
Depending on what - Triggers (the context)

There is a range of customer behaviors that will guide the timing of your sending, they are essential conditions for your segmentation (to understand overall behaviors) and then guide decisions on personalization.

These variables can be:

- The action done before, or cumulative actions;
- Completed versus incomplete actions;
- When a contact reaches a key milestone;
- When they corresponds to a certain variable;
- Etc.

The challenge comes from comparing several contextual information together and reacting accordingly. Let's also say that the when? will depend on the next point, the channel (WHERE?), which we cover in the next section.



4 Where?

For a personalized customer experience to be frictionless, it requires a real-time engagement that spans all points of contact. The challenge is significant as it includes digital channels, mobile applications, social media, SMS, the Internet of Things, and interactive technologies. Let's just say that with all this, there are countless ways to build a fully personalized customer journey for a one-person segment.

To fully understand and contextualize a customer interaction, companies need to adopt new technologies to recognize where the contact is coming from, what it is doing now, what it has done in the past, and even where it is likely to go. It is, therefore, necessary to create a process in which technologies detect the intention of the contact (based on data, of course) in order to modulate all the elements of the loop: who, what, when and where?

To achieve this high level of integration, it is important to do several things:

- Identify current touchpoints (have you mapped the paths of your typical customers?)
- Understand how they relate to each other (do you understand the impact of two or more channels together?)
- Recognize the data that will modulate the experience of the current channel (what are the rules to consider?)
- Measuring the channels that perform best (and why?)
- What does a contact prefer in regards to what? (So you can prioritize and modulate)



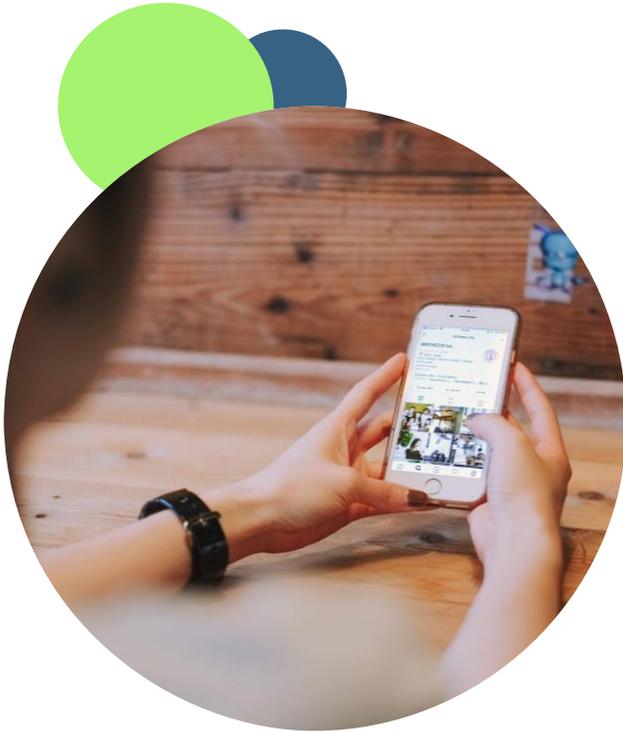
Where? (continued)

Of course, as discussed in the WHO section, it is important to have the most current and complete understanding of a person (i.e., their behaviors, preferences, interests and intentions).

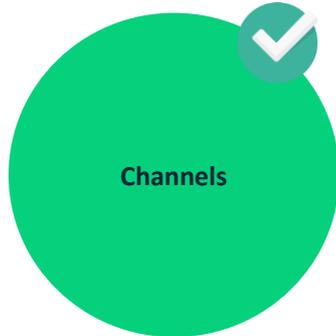
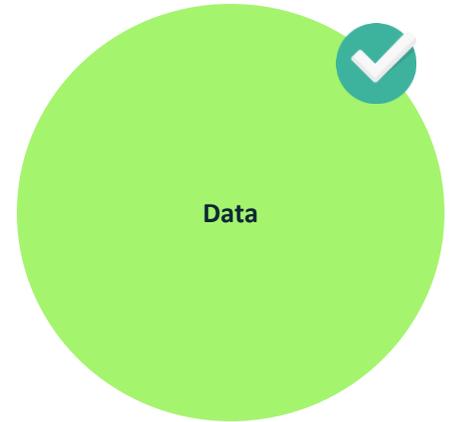
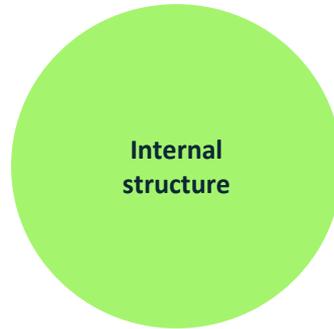
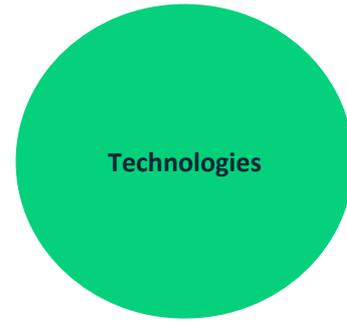
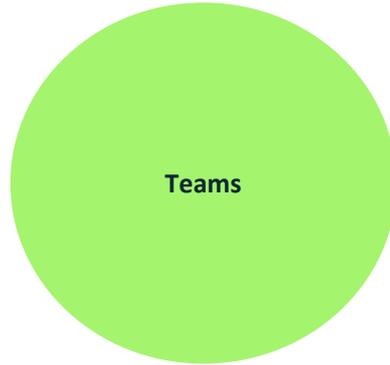
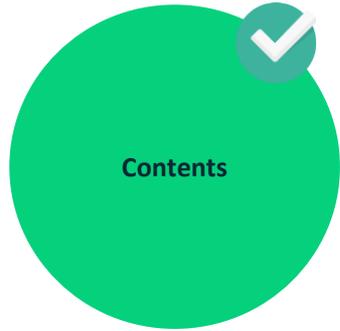
What is the best way to engage him on this channel? What is the best way to inform them about this channel? What will they logically want to do next?

This means that marketers must make the right decision based on the context. This is what influences a message, an alert or an offer. This is then orchestrated through all touchpoints that are relevant to that consumer, keeping the context in mind. This means that not every offer is good to make on every channel / you must know to stop when it's not relevant.

In this way, the experience offered maintains its coherence, regardless of the touchpoint or the stage of the journey.



The basics of personalization



What do do now ?



Modify the internal structure

There are only a few points left on our list of personalization essentials, and this first one won't come as a surprise. Personalization is only possible with an internal structure that supports, enriches and even evangelizes it. To achieve this, it is necessary to involve management in the decision-making process, since this is a business orientation. Then, teams must be given the means to carry it out. Some concepts to think about in terms of internal structure:

1. **Sharing** - Breaking down informational, technological, cultural and disciplinary silos is essential. All customer information is good to know, share and be used.
2. **Create multi-disciplinary teams** - You will have understood (I hope!) that personalization is everyone's business. Build teams that talk about product, data, technology and more. You'll be a winner just because you did so!
3. **Think Customer** - Put the responsibility on an employee to be the voice of the customer. Always make decisions based on their knowledge and empower them to make a difference.
4. **Govern your data** - Keep in mind that data is key, and understanding where it is, what it tells/says, how it moves... are all key aspects of your success, even for your teams. Share it!



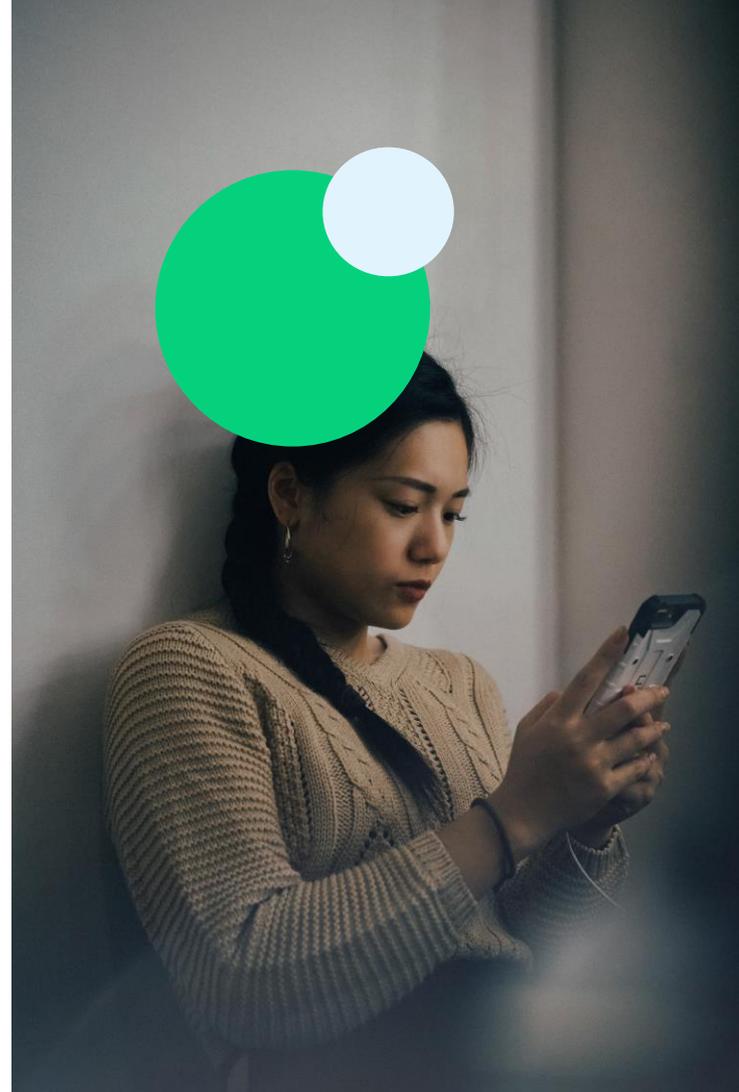
Having the right skills

As personalization becomes the cornerstone of digital strategies in many sectors (banking, retail, healthcare, etc.), marketers need to transform not only team structures, but also the operational links that connect these teams together.

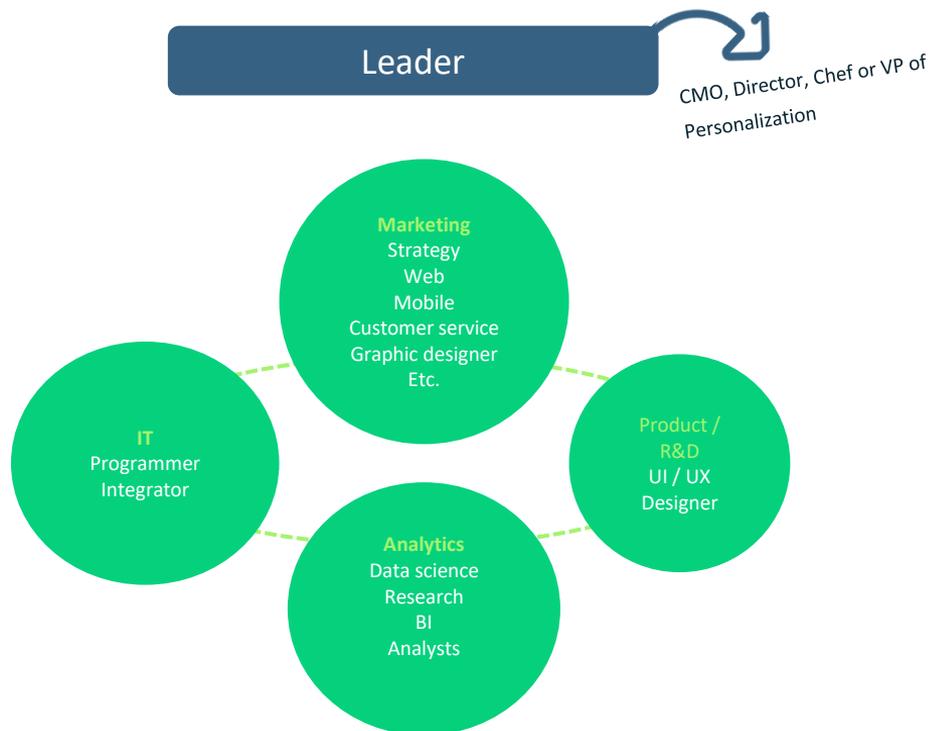
They must also be given the chance to understand how to work together, to develop their own procedures and processes, all with a concrete and clear objective to guide them.

What does the ideal team look like?

Unfortunately, there is no perfect team structure. Indeed, it is important to recognize that there is no ideal model for structuring a team. One business can thrive with one type of skill, while another will need more or less of a certain type. All this is linked to the different aspects of implementation discussed in this White Paper.



The key roles



Arbitrarily, a team should be multidisciplinary, with members from the following departments:

- Product
- Reasearch & development
- Marketing
- Analytics
- IT

Being all on the same team, but still having a link with the rest of these departments to keep an eye on the organization.



Getting the right technologies

Finally, as mentioned a few times in this white paper, personalization is intimately linked to the technological capabilities of companies. To better understand the types of technologies to implement, here is a list of the 4 categories you need to look at in order to facilitate its implementation.

1. Gather customer and prospect data from multiple sources into a single unified profile.

The first step before starting personalization efforts is to find a solution that can collect a large amount of data by itself (automatically) without relying on data from external sources. We have already talked about the Single Customer View, which will be managed and made possible through a [Customer Data Platform solution](#).

In addition, when evaluating personalization technology, pay attention to how the solution connects to other systems and how it stores data. This will save you a lot of headaches if you think about data aggregation and integration from the start.



Getting the right technologies (continued)

2. Collecting and analyzing behavioral data in depth

By collecting information on all contacts, regardless of their entry point and status, this makes personalization possible for both anonymous visitors who do not yet exist in your other systems, as well as those who are known to your systems.

A good system will then be able to collect data to help you understand a person's true interests and intentions, based on their past and present activities. In other words, it must be able to collect in-depth behavioral data, including clicks, time spent on a page, mouse movement, page scrolling, item hovering, inactivity, and so on.

Therefore, personalization tools are evolving, as they need to combine this behavioral data with contextual data on the offer (categories, brand and product content, tags, keywords, etc.). This is made possible by integrating either business rules, algorithms or even some type of machine learning, which provides an accurate indication of a person's affinities, interests and intentions.



Getting the right technologies (continued)

3. Personalize across channels from a centralized platform

While the importance of data cannot be overestimated, data activation is the ultimate goal.

During the planning phase, it is important to identify the channels you want to personalize. Think holistically, as this covers shopping cart abandonment messages, product and content recommendations, account-specific experiences, web and mobile application messages, triggered email, digital advertising, search, etc. And if there are individual solutions to personalize certain aspects of these channels, you can consider two options: a solution that offers the majority of these options, or a solution that works through connectivity to get the job done.

4. Using machine learning to identify the best experience for each individual

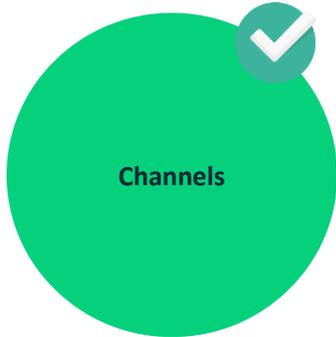
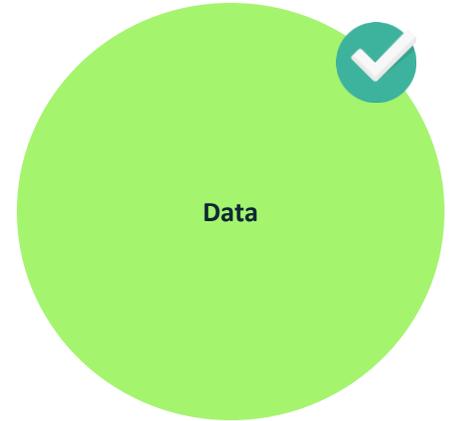
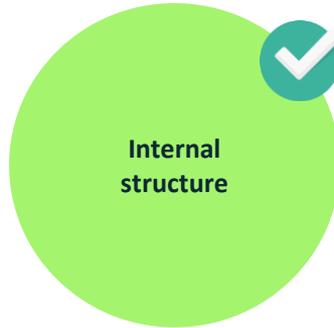
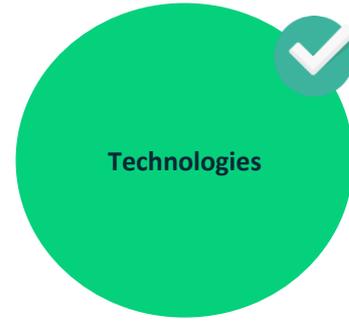
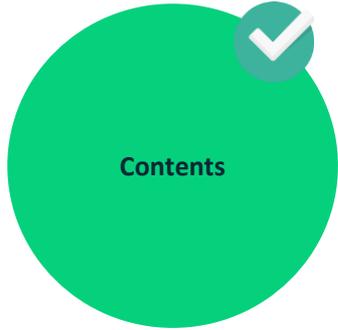
A personalized experience is supported by rules and/or algorithms. With rules, you manually define the decisions of the application. With the algorithms, you let machine learning decide what experience to show each person.

Combining A/B Testing

Your personalization technology must be able to test several experiments to find the one that works best for an individual. The simpler version is A/B testing, which can be created and controlled manually. It can also be done by developing different algorithms to find the one that works best, or by setting up test environments within the algorithms itself. Obviously, start with manual test, and go from there.

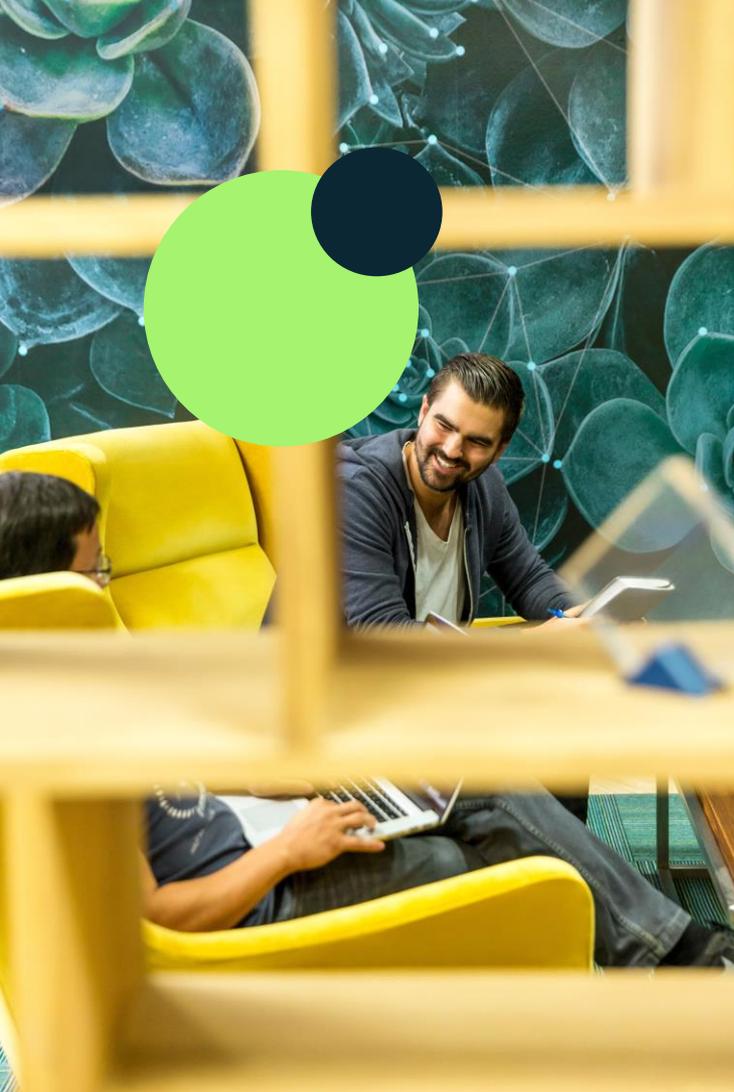


We've come full circle!



Conclusion





In conclusion, let's say that personalization is both a human effort (driven by a will to do), and technology (giving oneself the means to do it).

On the human side, organizations will need to develop a commitment to agile management, including multi-disciplinary teams dedicated to specific aspects and capable of reacting quickly. Equally important will be the ability to collaborate and solve problems with colleagues across the organization in the areas of IT, analysis, product development and legal.

On the other hand, technologies will have to lead to personalization at scale for companies of all sizes. Starting with governance over its data, it will then be able to develop an ecosystem capable of more effectively building relationships with its customers.

Only then will we see more and more companies providing superior, frictionless experiences.

About Dialog Insight

One of the most effective ways to achieve your growth goals is to take control of your customer data to maximize your marketing efforts.

At Dialog Insight, we believe that each of our customers is unique and that their needs are specific. Therefore, we have developed a platform that adapts to your changing context. On the one hand, we provide you with a unified platform that centralizes customer database, campaign orchestration tools, and detailed analysis of your performance. On the other, we offer strategic support services aligned to your needs.

Whether you're looking to increase sales or engage your customers, leverage customer insights you've gathered over time. You will communicate in a more relevant, coherent and personalized way than ever before. Make every point of contact an opportunity to offer your customers a brand experience beyond their expectations.

With Dialog Insight at your side, you are more than ever the master of your success.



