

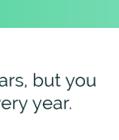
# 20 QUESTIONS

## TO ASK WHEN CONSIDERING AN 'ALL-IN-ONE' PLATFORM TO PERSONALIZE THE CUSTOMER EXPERIENCE

Marketers today have many options for personalizing the customer experience and optimizing online revenue. When reviewing your tech stack, you'll likely have to make a choice. Do you adopt a best-of-breed solution to boost your existing martech stack, or opt for an all-in-one solution that combines several digital marketing functions in one platform.

If you're looking for a solution that does it all – from storing your data to sending your emails – here are some questions to ask before taking the plunge:

### QUESTIONS TO ASK YOUR TEAM



#### 1. HOW OFTEN DO WE REVIEW ESPS?

- > A marketing database should last for ten years, but you might want to review or change your ESP every year.

#### 2. HOW MUCH WILL IT COST TO SWITCH ESP IN THE FUTURE?

- > If you put all your marketing eggs in one 'all-in-one' basket, it will be an enormous, costly challenge to migrate everything at once.

#### 3. IS OUR DATA HELD IN A SINGLE CUSTOMER VIEW (SCV)? WHAT DIFFERENT SYSTEMS MIGHT NEED TO ACCESS THAT DATA?

- > Uses for SCV go way beyond marketing - CRM, stock, ERP. If you want an SCV, get one that will cope with all of these requirements.

### QUESTIONS TO ASK YOUR VENDOR



#### > PRODUCT AND INTEGRATION

#### 4. IS THERE A GUARANTEED TIMESCALE FOR INTEGRATION?

- > How long will the system take to get up and running?
- > Can we get started generating revenue with basic functionality right away?

#### 5. CAN YOU SHARE YOUR ROADMAP? WHAT ARE YOU COMMITTING TO, AND WHEN?

- > What can we expect from the platform going forward?
- > Are you working to fill any current gaps in functionality?
- > Will the software move in a direction that's different from what we might be expecting?

#### 6. HOW WOULD WE INTEGRATE WITH YOU?

- > What existing technology will be replaced, and will we maintain the same level of functionality?
- > Does the platform have pre-built integrations with our current marketing stack, and any tech we might adopt in the future? What's the level of integration?
- > Will we have to build complex custom integrations?

#### 7. CAN WE SPEAK TO EXISTING CLIENTS WHICH AREN'T LISTED AS CASE STUDIES?

- > Can we get a broad picture of how the platform and services function under a range of different challenges?

### QUESTIONS TO ASK YOUR VENDOR



#### > SERVICES AND SUPPORT

#### 8. WHAT, WHEN AND HOW DO YOU CHARGE FOR SERVICES?

- > Will we get dedicated support?
- > Will we go through triage?
- > Are there premium support options if we have more complex needs?

#### 9. WHAT'S YOUR AVERAGE TENURE FOR SUPPORT PEOPLE?

- > Will we have a dedicated support team that knows the product inside out and sees through our projects from beginning to end?

#### 10. DO YOU HAVE ENOUGH EXPERTISE IN MY SPECIFIC VERTICAL?

- > Do you understand the specific requirements of our sector e.g. the nature of the customer journey, data requirements, and typical restrictions?
- > How quickly will features be developed to address new challenges in the market?

### QUESTIONS TO ASK YOUR VENDOR



#### > EMAIL PERSONALIZATION

#### 11. WHAT REAL-TIME EMAIL CONTENT TOOLS DO YOU PROVIDE?

- > Will we be able to deliver all the real-time content we need?

- Dynamic hero images, offers, CTAs, loyalty program balances and live countdown timers
- Live pricing
- Live stock information

- Location, weather, time, and device-based content
- Social proof integrations for ratings, reviews and popularity messaging
- Live web content

#### 12. HOW MUCH CAN YOU PERSONALIZE BULK EMAILS?

- > Can bulk marketing emails like newsletters and new product announcements be tailored to the individual's preferences e.g. with personalized product recommendations and images?

#### 13. CAN YOU PERSONALIZE AT SEND/OPEN TIME?

- > Will emails take into account the most up to date info about the shopper?
- > Can we make sure what a customer sees in the email aligns with what's on our website for a seamless experience?
- > Can we ensure that the promoted offers, product availability and pricing are always up to date?

### QUESTIONS TO ASK YOUR VENDOR



#### > TRIGGERED EMAILS

#### 14. HOW WILL YOU READ DATA FROM MY ECOMMERCE SYSTEM TO TRIGGER AND PERSONALIZE EMAILS?

- > Can the system capture and act on the following data in near real-time, without complex integrations?

- Transactional information
- Product details
- Stock levels
- Behavioral data

#### 15. CAN YOU SEND MORE SOPHISTICATED TRIGGERED EMAILS?

- > Will we be able to personalize triggered emails and set up advanced triggers like browse abandon, price-drop and back-in-stock emails?

#### 16. CAN YOU TREAT PEOPLE DIFFERENTLY BASED ON THEIR BEHAVIOR?

- > Can we treat people as individuals based on factors such as behavior, location and lifecycle stage? For example, running a different cart abandonment program based on:

- Browsers/carters of specific product types or brands
- New customers
- Loyal customers
- Carters of sale items

#### 17. HOW ARE CUSTOMERS IDENTIFIED?

- > What about visitors who normally use their desktop but who are using their mobile phone this time? If they've never identified themselves on their current device, can we identify them?
- > Do you offer multi-device cart rebuild to automatically refill the cart on whatever device the customer is using?
- > Will your solution help us optimize data capture to identify even more visitors?

### QUESTIONS TO ASK YOUR VENDOR



#### > WEBSITE PERSONALIZATION

#### 18. HOW WILL YOU HELP ME PERSONALIZE MY WEBSITE(S)?

- > Will the solution let us personalize a variety of web content including:

- Images
- Product Recommendations
- Banners
- Navigation bar

- > Can we easily personalize web content within the platform's interface?

#### 19. HOW SMART ARE YOUR PRODUCT RECOMMENDATIONS?

- > Will we be able to provide the right product suggestions at each stage of the customer journey, combining:

- Crowdsourced recommendations
- Personalized suggestions
- AI-based recommendations
- Social proof
- Our own business rules

### QUESTIONS TO ASK YOUR VENDOR



#### > TESTING AND OPTIMIZATION

#### 20. CAN WE EASILY MEASURE, TEST AND OPTIMIZE OUR MARKETING EFFORTS?

- > Will we have access to real-time, revenue-based reporting?
- > Can we test initiatives with A/B and split testing?
- > Can we immediately measure the uplift from features we've deployed, using control groups?

By keeping these questions in mind, you'll be able to work out how the solution stacks up against your present and future marketing goals. An all-in-one platform may cover a breadth of features, but you might need to plug in an additional best-of-breed solution to get the performance and adaptability you need.

Since best-of-breed platforms are built to play nicely with each other, you may find that a combination of these specialized solutions is the best way to build a customized marketing system that adapts as your company does.

Fresh Relevance is the real-time personalization platform to collect customer data, analyze and personalize. We help digital marketers boost customer loyalty and revenue by creating a customized journey across channels and devices.

Our platform sits between your eCommerce platform, ESP, CRM and CDP to gather data wherever customers go, providing real-time behavior and insight combined with the power to act on it.

