

The 5 pillars of personalization at scale

A blueprint for creating exceptional customer experiences

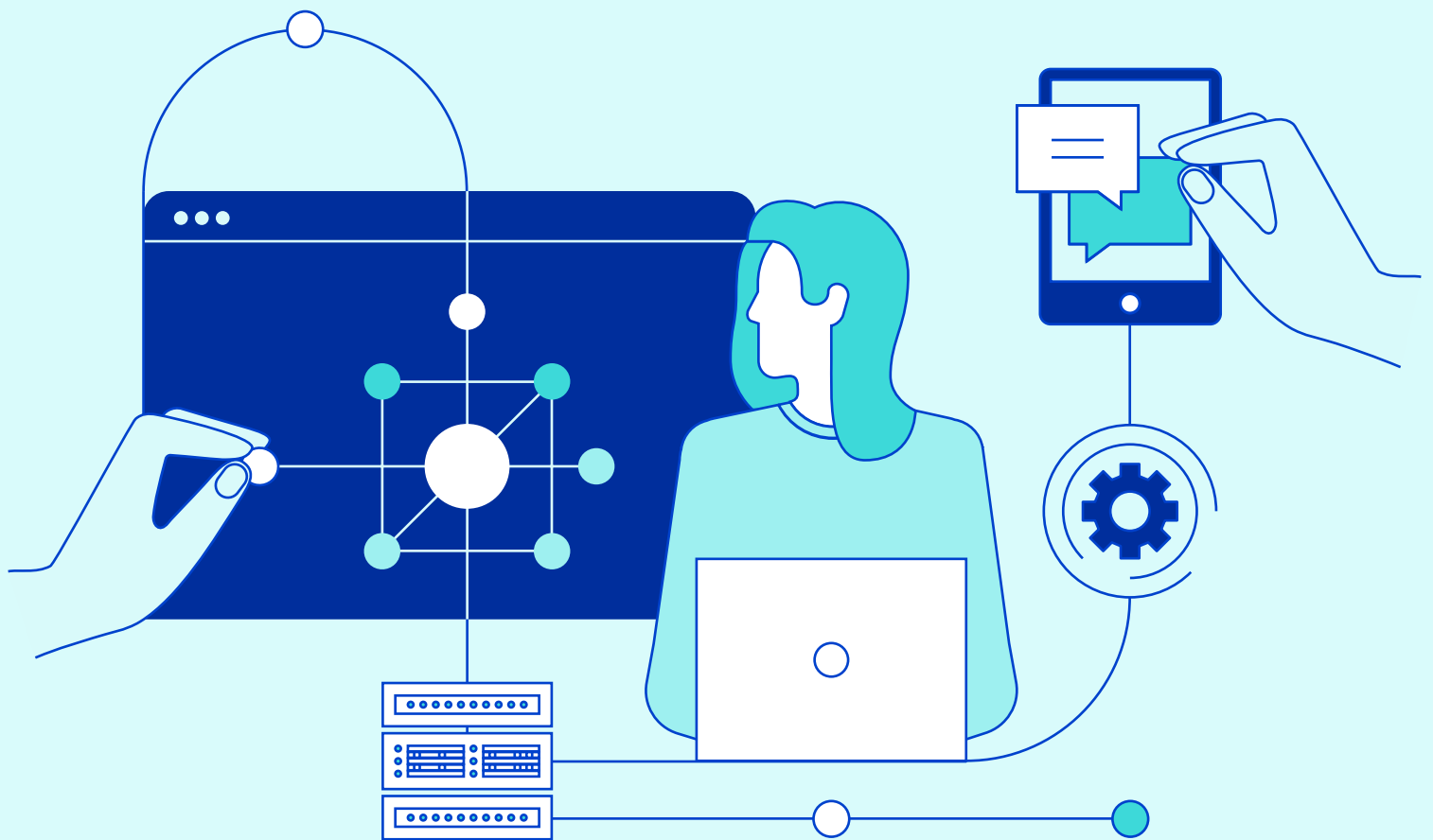


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Executive summary

Personalization helps build brand loyalty by creating customer experiences (CXs) your customers actually want to experience, over and over again. The potential value of personalization is well-established—one recent estimate sees it delivering 1.7 times higher revenue growth year over year.¹

But to engage today’s demanding customers in an environment of increased data privacy and decreased trust, it’s essential to take the next step: *personalization at scale*. This approach is more than just personalizing your messaging to more customers in greater detail. Personalization at scale means coordinating all aspects of your operations—from inventory and supply chain to sales and service—to make each customer interaction curated and valuable in near real-time.

From the customer’s perspective, personalization at scale experiences are seamless and helpful. They can seem like magic. But behind the scenes, they require effort, attention and technology. Their foundation is unified customer data and actionable profiles as well as well-coordinated processes, capabilities and systems across the enterprise.

The 5 pillars we describe in this paper support personalization at scale; they’re the starting point and provide a blueprint for your journey. With a better understanding of the preconditions as well as some inspirational industry examples, you’ll be able to imagine the “golden thread” of personalization—the ideal use case for your company. And you’ll be able to start delivering experiences that will delight and entice your customers.



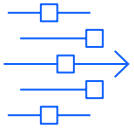
A handwritten signature in black ink that reads "Pierre Charchaflian".

Pierre Charchaflian
Vice President, Senior Partner
IBM Consulting

Why is personalization at scale necessary?



Personalization at scale means aligning your entire business to provide valuable, individualized experiences to your customers.



When done right, personalized experiences can seem like magic: surprising and delighting customers while dramatically improving their interactions with your business. Consider some examples:

- A busy parent planning a birthday party sees their online shopping cart already full of the supplies and decorated cake they need.
- Bank customers applying for a mortgage get application forms prepopulated with their info as well as links to local listings that match their preferences and budget.
- Mobile phone customers get a prompt to add an international line to the family plan just before their child starts a study-abroad program.
- A couple shopping for a new sofa generate an on-demand visualization of how the piece would look and fit in their living room.
- A manufacturer recommends products to a dealer based on past purchases, available rebates, market trends for that dealer’s portfolio and size, or changing buying patterns.

Personalized experiences aren’t just nice to have—they help the bottom line. For example, in 2021, Shopify reported on average a 94% increase in the conversion rate for merchants who featured personalized 3D content to help customers visualize how their purchases would look.²

IBM believes that the next evolution of the customer experience is personalization at scale. This approach is more than just personalization for more people, in more detail—and it’s more than marketing. Personalization at scale means aligning your entire business to provide valuable, individualized experiences to your customers. It coordinates operations across multiple departments, such as distribution, warehousing, supply chain, sales and service. And it’s the new imperative for companies that want to compete.

Why now?

It's common knowledge that retaining a customer is at least 5 times more cost-efficient than acquiring a new one.³ Today, 3 trends show that it's more important than ever to delight your customers.



Customer expectations

Customers increasingly expect to interact with your company on their terms: whether that's in person, through customer service, on a website or through an app. They "expect everything to be connected at all times"⁴ and continually reset their minimum expectations based on the best experience they've had anywhere. They judge your brand by its notable experiences—good or bad—and their loyalty must be continuously earned: 33% of customers said they were willing to switch companies after only one instance of poor customer service.⁵ Customer expectations mean your channels must convey a unified, consistent and contextually relevant experience.



33%

of customers said they were willing to switch companies after only one instance of poor customer service.⁵



The rise of the platform economy

Companies are more diversified in their offerings than ever before: many companies, whether they sell services, devices or widgets, are increasingly also in the business of selling content and becoming a marketplace. Partnerships between companies are also enabling new service models—think of a restaurant that can deliver meals without employing drivers, or a retailer that drives foot traffic by allowing online returns from another vendor. At the core of a platform company is the premise of cross-selling a given customer a wide array of products and services.

The success of this platform model rests on building a retention-focused customer relationship over time, and on delivering a CX that's personalized and connects all the expanded offerings.



New data privacy and cookie regulations

The foundations of the modern marketing model are shifting as data privacy protections become more comprehensive. In particular, the phaseout of cookies is challenging established digital marketing techniques for targeting ads and acquiring customers.

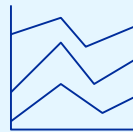
In addition to the technical challenges, these changes present an emotional challenge. Your customers need to trust your brand and your data policies. They need to see that giving you their data helps *them*. That's the only way they'll offer first-person data to help with personalization, and their permission to use other data you may have.

Together, these 3 trends point to one conclusion: reduce churn by building strong, lasting relationships with the customers you've worked so hard to acquire. Personalization at scale is the key to delivering individualized, relevant, valuable experiences that wow your customers and keep them coming back.



What's the value?

For your company, the value of personalization at scale is simple: strong relationships lead to higher customer lifetime value.



For example, among US credit card customers who feel valued:⁶

91%

plan to stay with the brand

83%

plan to purchase more from the brand

88%

will advocate for the brand

“Personalization, especially in a B2B environment where a committee is buying, requires focus on the decision maker and who is influencing the decision maker.”⁹

Bill Kircos
CMO, Honeywell

Personalization can also have a more holistic, halo effect—increasing ROI by improving your company’s net promoter score (NPS) and fostering brand loyalty. Even with early efforts toward personalization, companies in a 2020 Forrester report saw notable improvements in almost every metric, including NPS, average cart size and order frequency. And on top of the improvements, they realized a 33% increase in customer loyalty and engagement, a 6% increase in sales revenue and an 11% decrease in marketing costs.⁷

In B2B sales, the opportunity is perhaps even greater than in B2C. Imagine the benefit for B2B buyers if their supplier moved from an antiquated analogue model wherein the buyers needed to proactively reach out and place an order, to one where the cart for their monthly order was prepopulated with the products likely to be needed at this time of year. Or instead of reading a thick manual of specs and requirements for some widget, buyers could model the part in augmented reality (AR) and position it in space to see how it will fit on an assembly line.⁸

Regardless of the specifics of your industry or business model, personalization at scale can deliver value for both you and your customers.



Personalization perfected

To see the potential impact of personalization at scale, think of the so-called “golden thread”—the idealized vision of what personalization means for your business.

In the context of personalization, the golden thread describes a customer journey that connects many individual experiences and moments into an encounter that’s *ongoing, digitally transformed, relevant, personalized* and *valuable*.

Imagine the best possible personalized experience that customers could have with your business. Perhaps they start with initial discovery and researching products, reading reviews and talking to peers about your company. They could then compare prices and review your company’s environmental, social and governance (ESG) commitments. After deciding to make a purchase, they could interact with the support line, advocate for your company to others, participate in your customer community—and whatever else you can imagine. Each of these touchpoints can be personalized, and the resulting ideal experience is your golden thread.

The details will be different depending on your business. They will also change over time, because the best experience customers had yesterday becomes their minimum expectation for the future. But by visualizing your golden thread, you can imagine what’s possible: what would help you disrupt your industry, move to its forefront and stay ahead. In turn, this exercise helps you define what’s important now, what will be possible soon and where you need to apply technology and focus to make progress.

To achieve this potential, you need to have the right *organizational structure, ways of working, data, analytics* and *ecosystem*.



The 5 pillars of personalization at scale

There are 5 organizational requirements, or pillars, that support personalization at scale. They're a starting point, not the end: the solid foundation you need as you first design, then build personalization at scale. They encompass not only technology but also fundamental aspects of how your business operates. Let's consider them in more detail.



1. Establish responsibility for the customer experience

The traditional executive team structure has not often included a role solely responsible for CX. But that power must now be defined and assigned.

Consider a simple retail personalization use case: designing a virtual mannequin that lets a customer create an avatar and dress it in clothing options that are recommended for that customer. Who's responsible for defining the key features and attributes of this project? And who's responsible for fitting it into a larger personalization strategy? The CMO? The merchants? The CTO? The head of e-commerce? If it's not clear who's ultimately responsible for creating seamless experiences that foster customer loyalty, the project is much less likely to succeed.

The new CX lead could take many titles and plausibly come from many areas of the business. At Home Depot, this person was its longtime CIO,¹⁰ while McDonald's created a new role combining analytics, marketing, digital customer engagement, restaurant development and solutions, reporting directly to the CEO.¹¹ The essential point is that someone must be chosen and given the clear responsibility for the company's CX. For simplicity's sake, we'll refer to this person as the chief customer experience officer (CCXO), regardless of their specific title.

This dedicated role is important because it both signals an emphasis on CX and puts in place the reporting structure and resources necessary to make it possible. The CCXO must bring together multiple areas of expertise to oversee:

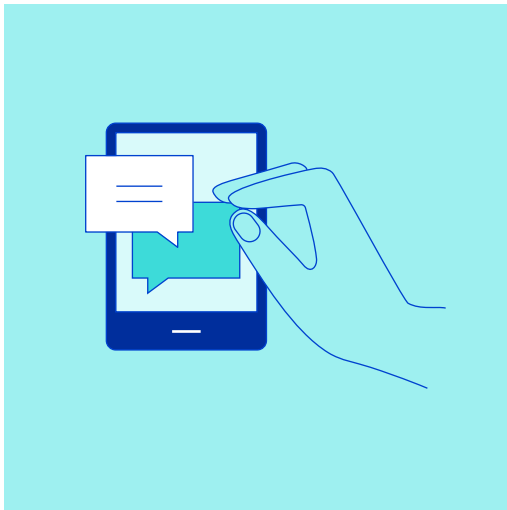
- A vision and budget allocated to drive, change, improve and evolve the CX
- Cross-functional abilities to drive collaboration across IT, data, customer service, supply chain, marketing, communication and manufacturing
- Orchestration of the ingredients to serve personalization across channels: content, campaigns, customer data and advertising technology
- Setting KPIs and delivering measurable ROI by improving the CX—including NPS scores, new acquisitions and loyalty
- Selecting and finalizing the golden thread concept that will serve as a guide

Whatever the specific title and whatever the previous scope, clear, executive-level responsibility and support are essential to make sure different areas of the company can all work together developing, deploying, assessing and refining meaningful personalization efforts at scale.



2. Embed customer-centric thinking into new skills and ways of working

The CCXO personifies and drives an organization-wide focus on CX, but that focus is transmitted to the entire organization when you embrace new skills and ways of working.



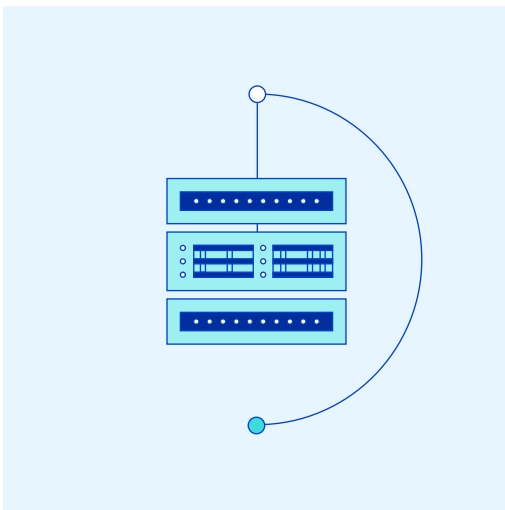
You should prioritize nimble, agile, cross-functional teams that work iteratively and support a culture to enact projects quickly, assess feedback and learn from the experience. These teams also need to work with the same data and tools so that enterprise solutions are used consistently and initiatives use existing personalization models and means of real-time delivery wherever possible.

To collaborate on projects effectively and build process consistency across teams, it can be helpful to employ a workflow management tool, such as Adobe Workfront or Aprimo. But new ways of working are achieved through new processes and mindsets, not just new tools. Cross-disciplinary teams and flexible work styles can bring together expertise from different parts of the business, using connected data platforms and governance tools to make personalized experiences both insightful and timely.

Furthermore, personalization doesn't have to be an all-or-nothing commitment. The cadence of your personalization projects can evolve to fit your new working style and drive incremental, tangible improvements. Start with a value-led, use-case-driven approach. Pick your desired outcome, then work backward to an initial minimum viable product (MVP) that supports that outcome. If there's an ROI from this project, then roll that return into an investment fund to support future initiatives. This way, the data, AI and workflow changes needed for each personalization phase can be predicted in advance and you can realize value incrementally, ideally with an initiative that funds itself.

3. Unify customer data to create individual customer profiles

Personalization demands a unified data foundation that can connect data from multiple customer touchpoints.



However, individual channels—such as online, in-store, customer service and supply chain—often use stand-alone platforms that are not fully, or even partially, integrated. As a result, customer data is trapped in multiple systems without being tied to a single, consistent customer ID. For personalization at scale to be successful, you must make use of multiple data types, such as:

- Click throughs, heat maps, browsing histories or other data captured through company platforms
- Customer relationship management (CRM) and first-person data, such as clothing size or personal interests, that customers provide to the company specifically to improve experiences
- Third-party data collected from sources without a direct relationship to the customer
- Master and transactional data available in e-commerce systems and enterprise resource planning (ERP) software
- Insights and business intelligence (BI) data available in data lakes

Connected and curated data supports a 360° view of each customer, which you can either use individually or aggregate to create audiences or dynamic profiles. This process doesn't mean moving or duplicating data; it involves connecting data sources through a common set of languages and formats, including governance and security protocols, so that the right data is available to the right people at the right time. Profiles can be dynamic in that they evolve over time as customers change how they engage with your brand and new avenues of engagement behavior become known.

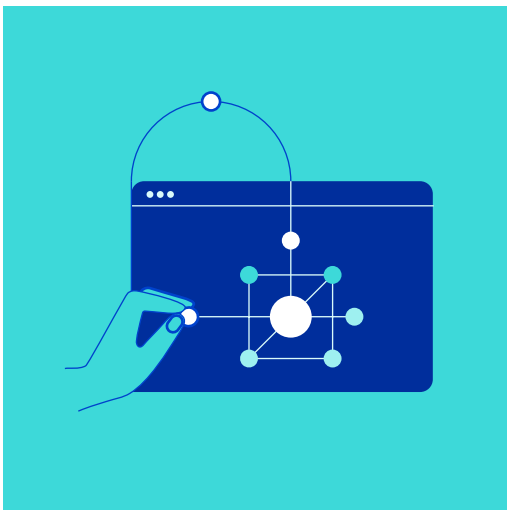
The customer data platform (CDP) sits at the heart of this data environment. It should have native integration with the sources of personalization data as well as native connectors to the various platforms that provide activation capabilities, such as a digital platform, marketing stack, and sales and services. In addition, the CDP should offer prebuilt patterns for important services and use cases, including:

- Resolving identities across disparate systems and stitching separate data points into 360° views of customers
- Streaming ingestion for real-time AIOps
- Prebuilt segmentation scores
- Predefined personalized offers
- Next-best-action scores
- Trigger mechanisms that facilitate proactive communications as new insights are gleaned
- Data science workbench and workflow for personalization models to be created, housed and matured

All these patterns and connectors make personalization capabilities consistently accessible so that it's easier for your company to apply relevant actions to every CX.

4. Maximize the value of advanced analytics

Once your data is collected and connected, you have the foundation for advanced analytics, whether stand-alone or embedded in other tools.



As is often the case with personalization, the specific applications of analytics will vary depending on your company's capabilities and goals, but they can include:

– AI at scale

Use behavior predictions and look-alike models to figure out the best experience for each customer in real time. In contrast to earlier versions of predictive analytics, you can do more than just identify the best customers to be shown a given campaign or product. By combining knowledge of customers' profiles with observation of their behaviors, you can determine the best offer or approach to take. Real-time personalization is inherently predictive and granular; it involves choosing from a large decision set of products, messaging and pathing. To support these choices, your data foundation, architecture, apps and website all need to be in real time with new systems in place to handle those real-time requests with minimal latency at scale.

– Real-time segmentation

Quickly select the right audience and segment for activation efforts. By applying rule sets and intelligent tools, you can create and update segments in real time as well as manage segment overlap and contact frequency. Unlike AI at scale, with segmentation, you're not predicting behavioral outcomes; rather you're assigning customers to salient groups for personalized advertising and marketing program activation.

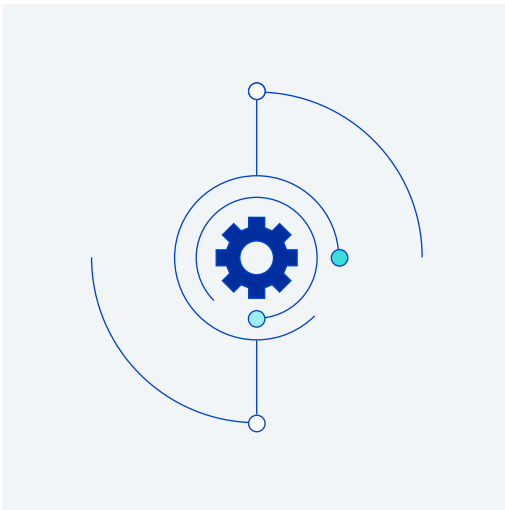
– Real-time customer journey analytics

Benefit from constantly updated metrics showing how you've interacted with consumers throughout their journeys. This kind of omnichannel reporting can standardize terms that are used in different ways by different segments of your business—for example, different departments might measure engagement differently. An analytics-driven customer journey report can facilitate company-wide understanding of the value of personalization. Most importantly, it helps you look at things from a customer's perspective instead of a channel perspective and keep that focus on customer journey orchestration.

The CDP also plays an essential role here: it's the forum where you can link data sources, apply analytics and then connect those analytic insights to personalization initiatives in marketing, engagement, experience, sales, service or another function.

5. Create a fully integrated and synchronized tech ecosystem

Connected data can still be complex and disparate. Coordinating the right data with the right users is the final—and often overlooked—pillar that supports personalization at scale.



Without such coordination and integration across marketing, sales, manufacturing, finance and supply chain, it doesn't matter how good your CDP is. The answer to this challenge lies in an orchestration layer.

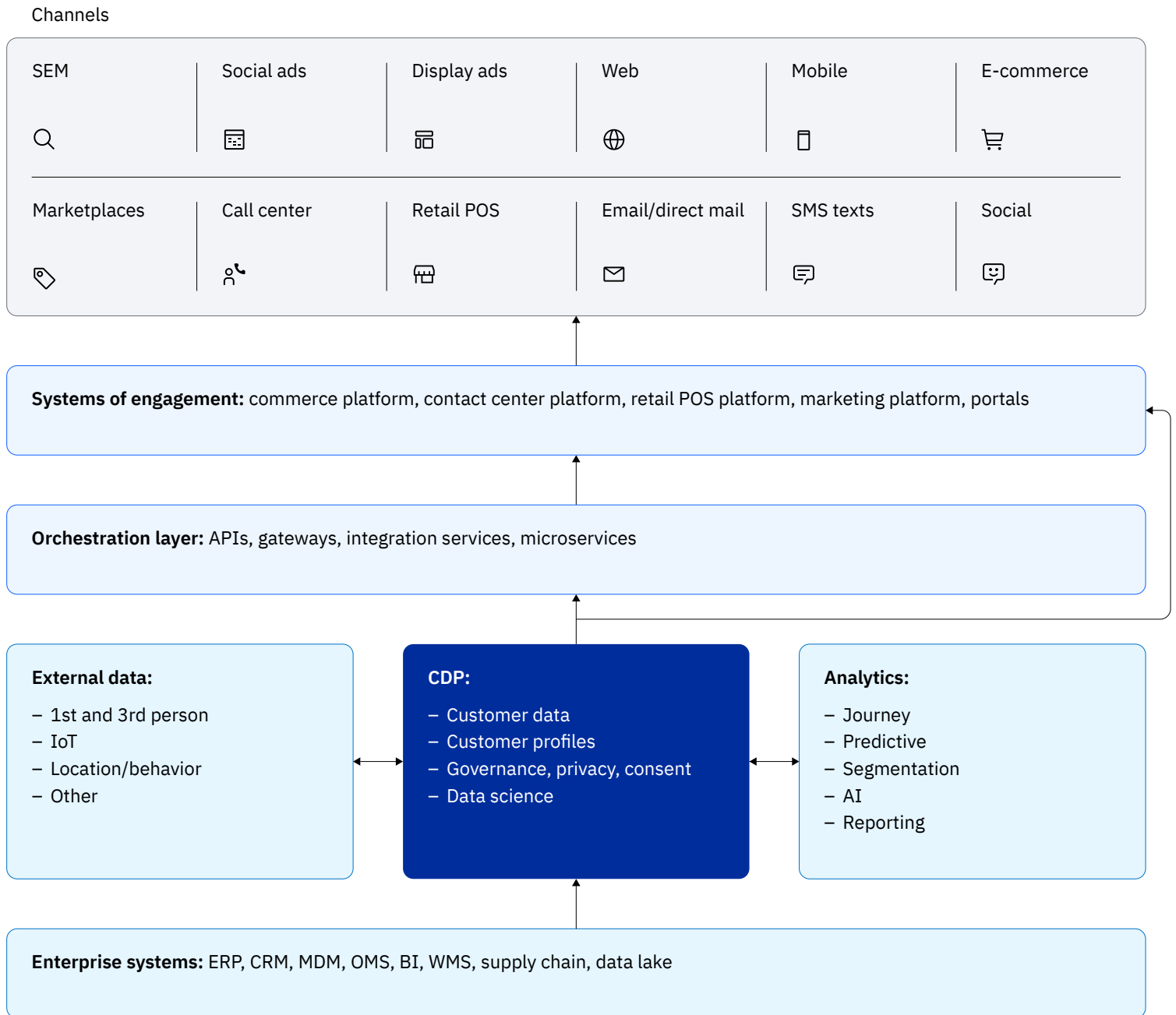
This layer sits between the data store and the systems being accessed, which are otherwise known as *systems of engagement*. Depending on your needs, this layer can take the form of APIs, gateways, integration services, microservices or something else. This essential idea is known by many terms, including modular, headless and loosely coupled architecture, but in all cases the key point is that you have a layer exposing context-sensitive personalized data to the apps that consume it and drive personalization experiences for the user.

The orchestration layer makes it possible to drive results across widely separated layers of the tech stack. For example, you can use data stored in an ERP system and ingested into a data lake to personalize, in real time, the experience in a user's mobile app. In addition to supporting current personalization efforts, an orchestration layer makes it far easier to adapt and support future use cases that are either not practical right now or entirely unknown. The orchestration layer exposes data for consumption, so you can serve the same data to new channels. The developers of these new services won't need to know the underlying data architecture; they can get the data they need with a simple API call.

From an organization and skills standpoint, it's also important to have a data science practice as a key component of your CX initiative. Data science professionals can work across business and IT to analyze the data flowing from all these disparate systems and provide the insights necessary to build the context-specific APIs that drive personalization across touchpoints.

With all 5 pillars in place, you'll be prepared to deliver personalized experiences to your customers.

When you implement all 5 pillars in your organization, the CCXO and agile teams will have a personalization environment that looks something like this:



Industry examples

Companies across industries are facing the same challenges of customer retention, product differentiation and new regulations related to data use. But leaders are already making progress and, in some cases, starting to reap significant rewards from CX personalization.



↑ 176%

increase in online revenue
from target segments

↑ 25%

increase in online
conversion rates

↑ 10%

average increase in
order size

Retail

Retail companies need to offer differentiated experiences to capture slim and increasingly competitive margins. This phenomenon is particularly acute in the grocery industry, where average profit margins range from 1% to 3%.¹²

Recently, a team of IBM and [Adobe](#) experts and design consultants collaborated with a leading US grocery retail chain to transform its e-commerce experience. This chain's sub-brands each had multiple apps and disparate data systems. The fragmented status quo required enormous upkeep and didn't allow for a streamlined customer journey or sharing content across brands.

The [IBM iX](#)® experience design consultancy began by working closely with the grocery chain's teams to identify and prioritize more than 100 opportunities for personalization. From these opportunities, the team selected several CX and personalization events to enable, including automatic replenishment and personalized landing pages. They also developed over 2 dozen components for future personalization efforts: these reusable modules can provide targeted recommendations, monitor KPIs, schedule data science jobs and more.

These efforts represent true personalization at scale: utilizing wide and deep data about individual customers and connecting that data to an array of company operations, from sales to inventory and logistics. The results were striking, including a 176% increase in online revenue from target segments, a 25% increase in online conversion rates and a 10% average increase in order size.¹³ And the chain is well-positioned to capture additional value in the future by, for example, monetizing media and optimizing B2B sales and marketing. The business case for just one target segment demonstrated an increase in over USD 200 million in revenue.

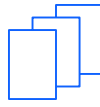
Banking

Financial institutions must offer personalized products that attract new customers while increasing the value of existing customer relationships—and there are many opportunities to do so.

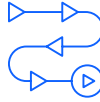
For example, a global bank that goes to market through point-of-sale credit card applications in retail stores and with travel partners at airports needed to simplify and consolidate its application process. Panel studies and Adobe Analytics funnel report data showed that the complex sign-up process was causing user drop-off. Behind the scenes, bespoke credit card application processes, marketing collateral, card member agreements, and terms and conditions were reinvented for each partner product. This lack of connectedness between platforms, a poor user experience and lack of scalability were proving to be far too costly.



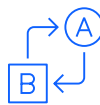
IBM Consulting™ worked to consolidate and standardize the applications and marketing materials while centralizing the source of truth for customer journey data and profiles. This initiative included the strategy and implementation of Adobe Campaign and Adobe Experience Platform to integrate customer data across all marketing campaigns, web properties and mobile apps, enabling real-time universal customer profiles for personalization. This end-to-end transformation led to several benefits:



A new componentized process is now replicable for different cards across partners, reducing operating costs and improving speed to market.



The universal customer profile enables a personalized CX across channels: mobile, web and paid media. Offers are individually tailored and consistent across every channel of interaction to support regulatory compliance.



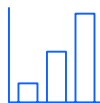
Partners gain useful insights into the customer journey in ways they previously couldn't. The bank can undertake A/B experiments and optimization, adopting a culture of "test and learn" to find experiences that increase conversions.



New cardmember-completed applications increased over 10% at point of purchase, and approximately 7% online.



Easier app functions, such as "find my balance" and "pay my bill," improved customer engagement in the app by over 25%.



The bank's J.D. Power ranking improved year over year.

Utilities

Utility companies are under unprecedented pressure, because 3 out of 4 consumers report wanting to do more to reach their sustainability goals at home, including reducing water and energy consumption, and generating renewable energy.¹⁴ Furthermore, customer dissatisfaction can now lead to regulatory pressure and customer churn. Therefore, customer satisfaction—and the ability to provide ecologically friendly product offerings for interested consumers—are extremely important.



IBM works with a large energy company that's heavily invested in Adobe's CX marketing technology. However, its existing business and technology marketing operations were disconnected across its marketing applications. Marketing teams didn't have access to all the customer data they needed to activate their acquisition, retention and customer satisfaction programs.

As part of a centralized, strategic, data-centered effort, the teams created a 3-year golden thread journey showing how a best-in-class center of excellence (CoE) would enable a hyper-personalized CX and more valuable employee experiences.

The key areas of focus were:

- How collaborative relationships across marketing, the business and IT can enable culture change and radically transform CX
- The difference centralized intake can make on the teams and on visibility for reporting progress
- Putting in place a CoE to support personalization program governance across their marketing applications
- Working with technology, data, analytics and marketing teams to define a use-case-driven personalization program strategy
- Implementing Adobe Experience Platform applications including real-time CDP and customer journey analytics, and integrated broader data systems to support strategy initiatives

This journey is expected to garner significant results for the company: reducing internal costs, improving customer satisfaction and boosting conversion of customers into new revenue-producing programs.



Travel

The travel and transportation industry has traditionally struggled to build a single view of the customer, due to siloed data sources and systems of record. In the case of an airline, these silos could include reservations, customer care, itinerary data, loyalty programs and partnerships, such as credit cards, government-run traveler programs and more. This environment often results in multiple data records and customer profiles with limited or no integration.

The opportunity is ripe for a forward-looking airline to embrace customer profile integration and differentiate its CX. For example, an airline could:

- Improve self-service tools to reduce call center volume and streamline rebooking
- Enhance more relevant audience targeting and precision of offers
- Consolidate customer profiles to improve personalization and messaging consistency
- Synchronize and unify omnichannel experiences, workflows and data
- Cross-promote tailored offerings related to the traveler’s destination, refined by personal interests and historical interactions

Delta Air Lines is taking steps in this direction. It appointed a CCXO who comes from a customer service background¹⁵ and, in January 2023, announced Delta Sync,¹⁶ an expansion of its loyalty program. It will provide free onboard wifi to members and enable them to use technologies, such as facial matching, to expedite security, boarding and baggage handling.

Although new, these announcements have already garnered significant positive attention, with Forbes stating “a new, digitally enhanced era of flying may be here.”¹⁷



How to get started

Once you've implemented the 5 pillars and set up your personalization environment, you can assess your readiness for personalization at scale. Identify your current capabilities and needs in each focus area before proceeding.

Next, identify the golden thread: the best-case scenario for personalization in your company. For example, IBM Consulting offers the [IBM Garage™](#) approach and methodology to co-create and quickly iterate and determine a personalized experience. Our golden thread exercise involves taking an inventory of desired outcomes, prioritizing use cases, defining the operational blueprint and calculating the expected ROI.

Once you understand your current capabilities and your personalization goals, you'll be able to decide whether to get support from a partner. Most do: 83% of companies said they work with an external partner to manage and update their CX data resources.¹⁸

Whatever your environment, IBM can offer the experience and expertise; we have over 6,000 consulting certifications in [Adobe](#) technologies, 10,000 in [Salesforce](#) and 20,000 in [SAP](#).¹⁹

Personalization at scale is not simply a matter of a software deployment or systems upgrade. It builds over time—spanning advisory, design, implementation, management and optimization. It's an ongoing experience, so you must also continually reassess, refine and redeploy your personalized CX: adding new features, capabilities and experiences as markets and consumer behaviors evolve. It's an exciting challenge, but with solid technology foundations and your whole company aligned to the right goals, you'll be able to deliver exceptional experiences and delight your customers time and again.





Next steps

Explore [IBM iX](#).

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