

Digital Services



Customer data platform

Setting the strategic foundations for customer 360°
and personalization at scale



Business

Executive summary

The business world continues to look for new ways to enhance customer experience (CX) and use digital transformation to keep customers happy, engaged, and loyal. Companies that want to thrive in a constantly changing marketplace need innovative, progressive tools in place that leverage data to drive CX and stay competitive. A customer data platform (CDP) is a key piece of the puzzle.

Today, your marketing and CX are only as good as the data you put into them and how you use it. Personalization is essential, you must meet your customers on their terms and give them an experience over and above what they expect. To do this you need access to rich, real-time customer data.

A CDP is a centralized platform that lets you collect, process, and activate customer data. By leveraging advanced analytics and automation, you can build insights, create personalized marketing campaigns, streamline marketing operations, and comply with data privacy regulations. A CDP is a powerful tool if you are looking to enhance your customer data management capabilities and take your marketing to the next level. Further, it helps you maximise your marketing ROI, reduce time to market, enable omnichannel campaign orchestration, keep your customer data secure and improve CX overall.

This paper will explain how.

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Marketing and CX today need more understanding to succeed

In today's business world, customer experience (CX) is key; it differentiates you from your competitors and keeps your customers happy and loyal. But delivering great CX isn't simple: you must overcome the challenges of a myriad of communication channels, entrenched organizational and customer data siloes, and increasingly decentralized workforces. It can make it difficult to deliver the experiences your customers expect and are prepared to pay more for. A customer data platform (CDP) can give you the edge.

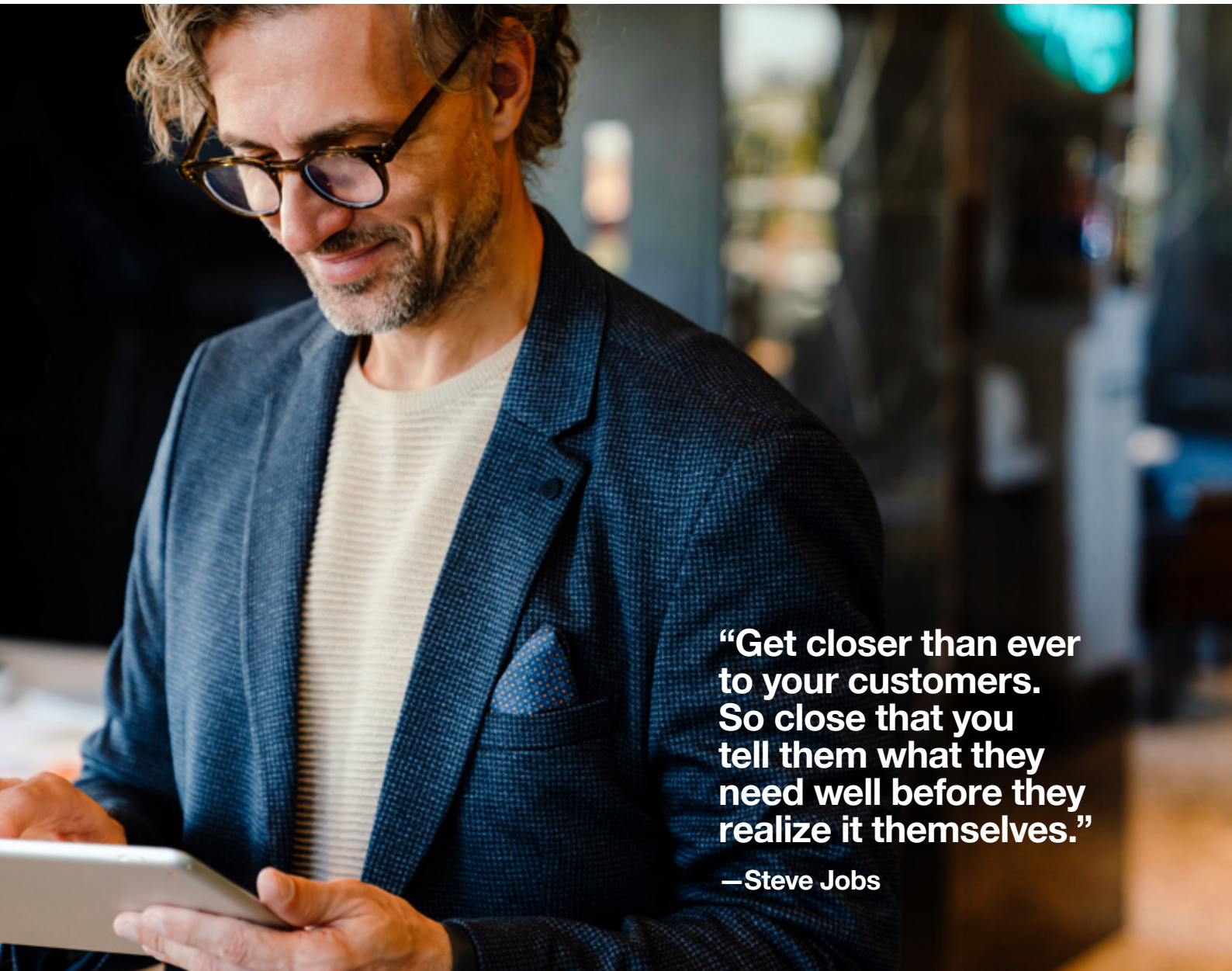
77%

of brands believe CX is a key competitive differentiator (IDC)

Market context

It's not easy to deliver consistently great CX to your customers. You face constantly changing market conditions and fluctuating customer moods that can be influenced by many factors, from social media to word of mouth. And you need a CX that also drives growth and contributes to your company's ROI and profitability. Formulating that kind of results-generating CX requires careful planning and forethought. It requires initiatives that reduce time to market by enabling business and front office teams to be self-sufficient in leveraging customer data and managing experience.





“Get closer than ever to your customers. So close that you tell them what they need well before they realize it themselves.”

— Steve Jobs

Implementing centralized customer and audience insights will also improve targeting accuracy and the ROI of omnichannel marketing. You can reduce your cost-to-serve expenditure by providing enough self-service options with a high level of automation on processes and journeys. This will also allow you to balance service levels with customer lifetime value. Consider mechanisms to increase loyalty and customer value by reducing friction along the journey and proactively engage with customers based on their behaviours, interests, and intents.

By combining customer and partner feedback plus insights about overall product attractiveness and sales performance, you can increase product and CX quality. Your organisation is home to vast swathes of valuable data, and advanced analytics can help you create real-time insights that become drivers of marketing campaign performance and help you improve ROI on your marketing activities.

Ultimately, a powerful blend of tools and processes can empower your organization to greater heights, competitive advantage, and ongoing success.



Increase customer comprehension with a customer data platform

It has long been the case that a 360-degree view of the customer is a CX essential, and the starting point for creating valuable CX initiatives. A complete view of customers allows you to identify them as individuals and leverage past behaviour such as buying patterns and preferences across channels and locations to create relevant, engaging interactions.

Real-time customer profiles

However, a traditional 360-degree view is no longer enough to meet customer expectations and deliver a CX that sets you apart from competitors. You need real-time customer profiles that change and update as your customers' minds change. And to enable this complete, ongoing real-time knowledge of your customers, you need a customer data platform (CDP).

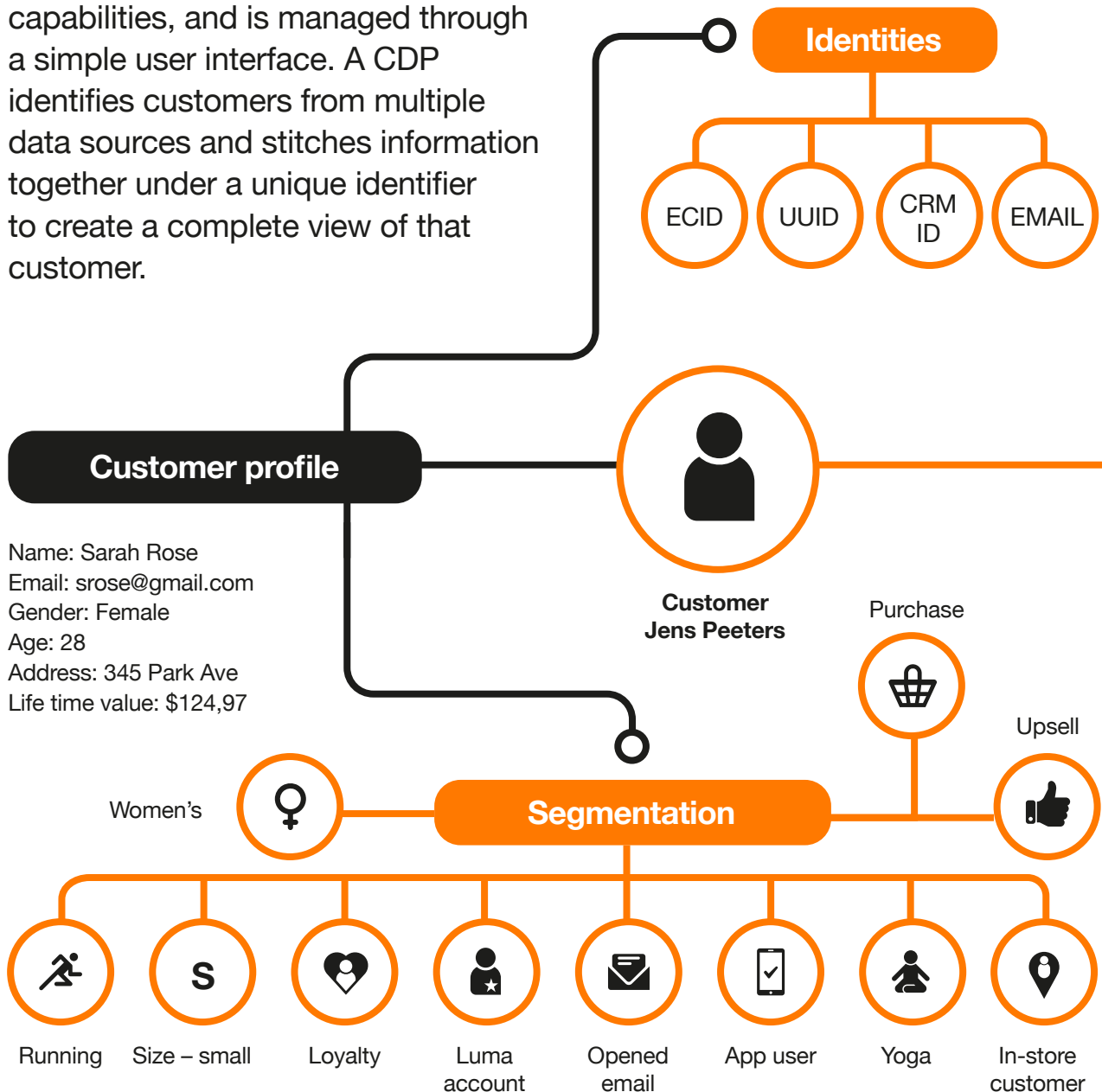
“CMOs must provide mutual value on digital channels across the full customer journey”

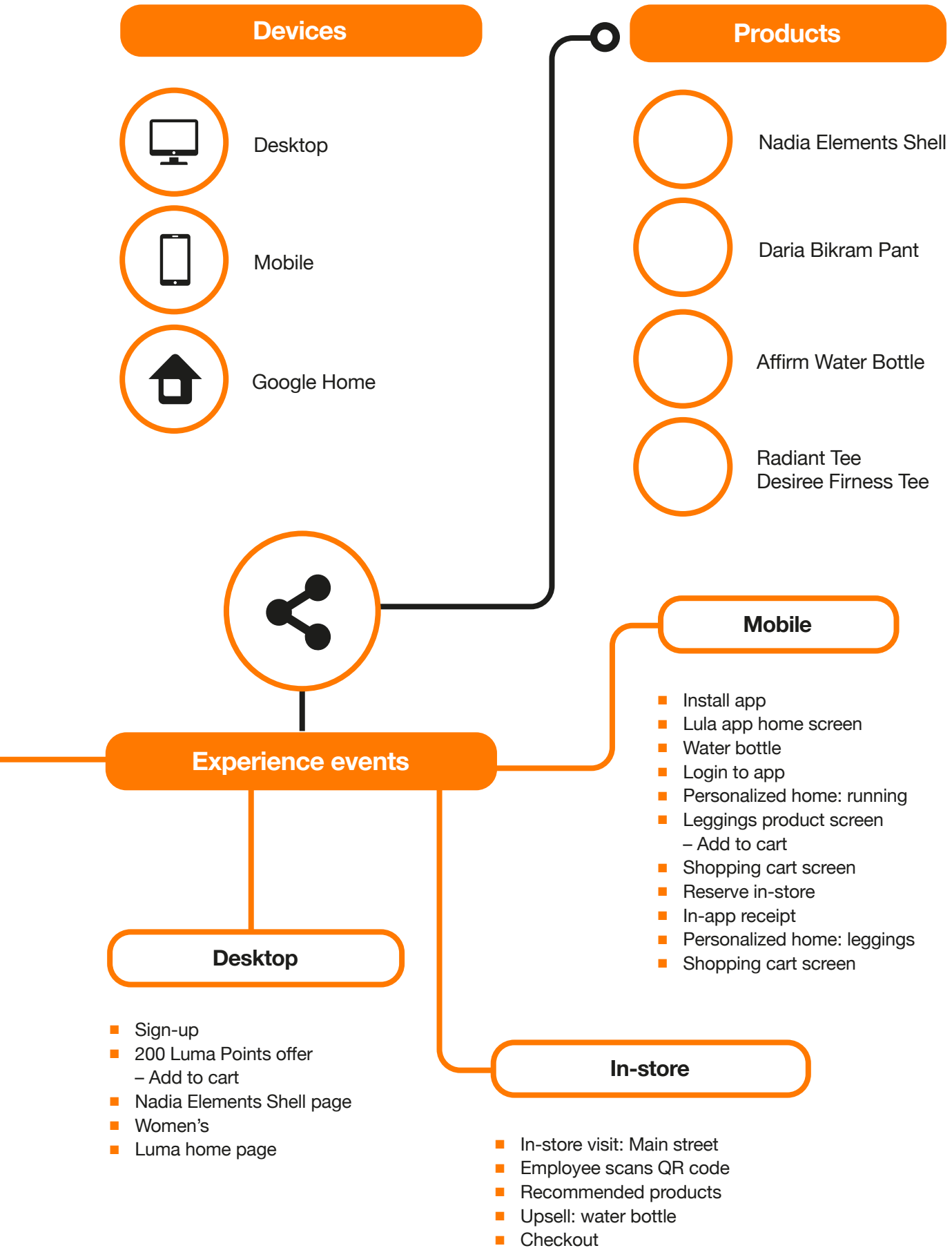
– Gartner



What is a customer data platform (CDP)?

A customer data platform (CDP) centralizes customer data to enable omnichannel activation. It offers flexibility, has real-time actionable capabilities, and is managed through a simple user interface. A CDP identifies customers from multiple data sources and stitches information together under a unique identifier to create a complete view of that customer.







What types of platforms are available?

Customer data solutions include data management platforms (DMP), customer relationship management (CRM), and CDP. It helps to understand how a CDP differs from other solutions to appreciate how much it can transform your business fully.

CDP

As described earlier, a CDP collects, unifies, and manages customer data from various sources to create a comprehensive, actionable view of each customer. Depending on which variety of CDP you choose, it can also include a set of analytics and orchestration capabilities.



A CDP operates as the central hub for your customer data and can be used by different teams within your company. In contrast, a CRM primarily focuses on operational sales and customer service, and a DMP primarily focuses on targeted advertising and personalizing content. CDPs can be used in partnership with CRM and DMPs, as it provides a more complete view of customer data. And it enables better decision-making and a more consistent CX across all touchpoints.

CRM

CRM tools focus primarily on managing customer interactions and interactions history. It helps you manage customer interactions across different touchpoints. CRM is typically used by sales, marketing, and customer service teams to manage customer interactions and automate business processes. It generally is the solution responsible for matching, cleaning, and normalization of customer data into a “golden record”, a single, true, 360-degree view of customers and activities.

DMP

A DMP helps you to build a bridge between your first party data and second- & third-party customer data. It is typically used by marketing and advertising teams to target and personalized ads and content. In doing so, DMP's rely heavily on the use of third-party cookies building the bridge between advertising networks and your companies CDP. Due to the recent developments in data privacy legislation on third-party cookie limitations, DMP's are considered as less relevant in the current time to invest in.

Different types of CDP

There are a range of CDPs available on the market, so it is important to understand what type is right for your company's needs.



Data

A data CDP focuses on the key capability of a CDP: collecting and processing customer data and creating a 360-degree customer profile. These types of solution often focus on the availability of having a wide set of connectors to other vendors.

Examples of data CDP vendors include Segment, Rudderstack, and Snowplow.



Analytics

CDPs of this type have an extension that is focused on analytics. Typical use cases for an analytics-based CDP would include customer journey analysis and attribution modelling. With this CDP type there is a high overlap in capabilities with marketing technology mentioned as product analytics solutions.

Example vendors of analytics CDPs include Genesys Pointillist, Posthog, Qualtrics, and Adobe Customer Journey Analytics.

All these various CDPs offer different benefits and advantages, so it is important to clarify your needs with a business goal-driven approach. It's also important to remember that technology is not a cure-all, it is merely an enabler. As your trusted CDP partner, Orange Business is vendor-agnostic, enabling us to select the most appropriate variation of CDP tailored to your specific business needs.

10,000+

CDPs are a MarTech solution. There will be over 10,000 MarTech solutions available by end of 2023 (source)



Campaigns

A campaign CDP offers data consolidation, analysis, and customised customer engagement. What sets them apart from segmentation is their ability to tailor unique treatments for each individual within a segment. These treatments can range from personalized messages and outbound marketing campaigns to real-time interactions and product or content recommendations. Campaign CDPs generally have a wide set of connectors to provide for actual delivery of the content.

Example campaign CDPs include Imagi-no, Blueshift, and Lemnisk.



Orchestration

Orchestration type CDP differ by including the content delivery aspects within the same solution/ecosystem. They offer all other previous functionalities plus also the ability to deliver through email, web and mobile applications, CRM, advertising or multiple of these channels.

Example orchestration CDP vendors include Bloomreach, and Adobe Experience Cloud.

How does a CDP work?

A CDP lets you collect, process, and activate your customer data within one centralized platform. Used correctly, a CDP helps you save time and resources on creating real-time profiles of your customers, and drives increased customer satisfaction through more customized, personalized, and engaging experiences.

CX drives over two-thirds of customer loyalty, outperforming brand and price combined

– Gartner

1

Collect

Known Customer Data

- CRM
- Email
- Account Association
- Customer ID
- Partner ID

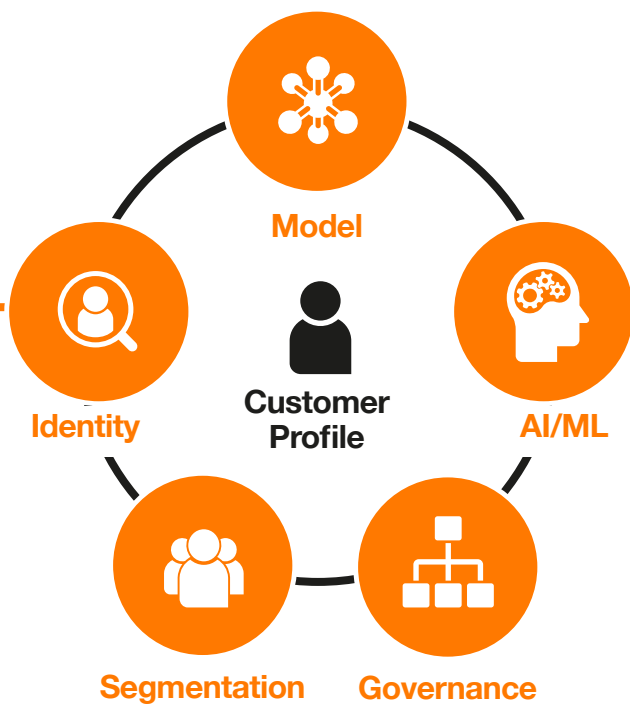
Unknown Data

- Behavioral events
- First party cookies
- Device ID
- Advertising data
- Pseudonymous IDs

Collecting customer data from various touchpoints on the journey enables you to build tailored, inclusive customer profiles. It helps you shift from the dark funnel to full visibility of your customers' journeys. A CDP is also a powerful tool in securing your customers' personal information: it leverages customer consent and identifies customer preferences to deliver a robust, secure platform that builds trust with your customers.

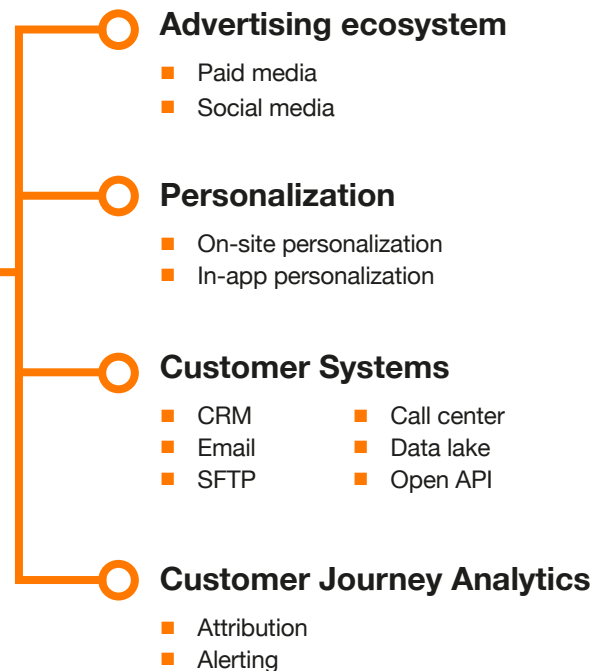
2

Process



3

Activate



A CDP provides a deeper understanding of your customers, helping you target and segment your audience more effectively with personalized campaigns built on their behaviour and preferences. It provides tools to measure and optimize your campaigns, built on data-driven decision-making. Advanced analytics help you create real-time insights that become drivers of campaign performance and improve ROI on your marketing activities.

This is where the CDP delivers actionable benefits. A CDP is a unified platform that empowers you to manage and analyse customer data across all channels, including online, offline, owned and paid ones, enabling you to design and implement consistent and cohesive marketing campaigns. This provides the foundation for more coordinated, optimized campaigns across multiple channels: step three is where you can begin to exploit your data using omnichannel communications. A CDP gives you power and control not available with previous tools and solutions. It gives you a clear approach to real-time 360-degree customer visibility and helps you use data to drive value for both you and your customers.



Things to remember



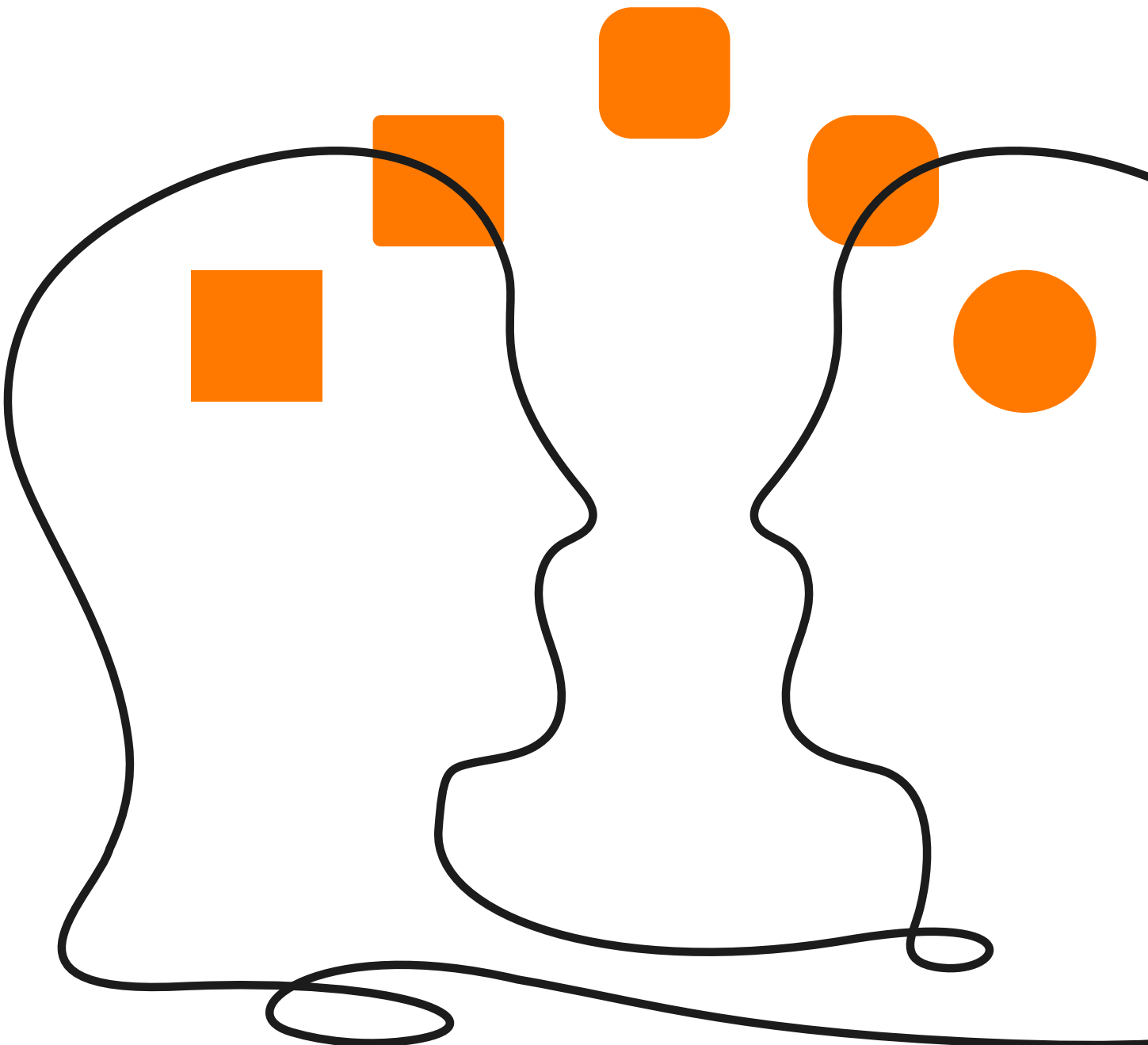
“The future of superior customer-experience performance is moving to data-driven, predictive systems, and competitive advantages are in store for companies that can better understand what their customers want and need”

– McKinsey

- A CDP collects, processes and activates customer data
- You need a complete view of your customers to identify them as individuals and leverage past behaviour
- Centralizing customer data enables efficient omnichannel activation
- You have to pull together multiple data sources and stitch information together to create person-based profiles
- You need to enable collection of customer data at all touchpoints on the journey
- A CDP gives you the power and control you need to achieve all these

What is the value of one platform?

Marketing technology (MarTech) has been around for many years, but as with so many tools designed to make your business simpler and more effective, it can suffer from overthinking.



Common Pitfall: 2 Brains Driving Marketing

The “two brains” theory is too often in play when choosing a MarTech platform. This theory is linked to one “brain” making choices around decisions - for example, which business rules define you are part of a segment. The other “brain” makes the orchestration choices. For example, that might be showing the same content of a promotion in an email as in a main website banner. It creates a setup where you have two very different approaches to your marketing technology. This can lead to data and model duplication, multiple user interfaces (UI), inconsistent inbound and outbound communications and unnecessary OPEX cost.

Companies sometimes put too many solutions in place. They try to drive results, but risk ending up with a confused landscape, with data siloed and of limited value.

A CDP gives you a “single brain” approach which comes with advantages: from a technology perspective it reduces the number of vendors involved and simplifies customization. More importantly, from an employee perspective it makes leveraging your customer data a more seamless, less siloed exercise, and makes both internal ROI and time to market far more effective.

Risks

- Data & model duplication
- Limiting business self-service
- Multiple UI's
- Inbound & outbound consistency
- Use-case base integration E.G., real-time journeys
- OPEX cost & effort

CDP and the customer journey: use cases

A CDP enables you to influence every step of the customer journey and formulate more use cases than other platforms do. It empowers you to drive transformative, end-to-end experiences for your customers at every touchpoint.

- Propensity to buy
- RFM personalization
- Abandon cart
- Geo location trigger



CDP use cases: a five-step journey

Step 1: Awareness

A Customer Data Platform (CDP) is a tool that lets you identify anonymous visitors to your website by collecting and analyzing data from sources like cookies, devices, and IP addresses. This allows you to understand who your visitors are and what they're interested in, even if they haven't provided any identifying information. This method of data collection can be integrated with any of the existing tag management solutions. Furthermore, a CDP enables you to re-target anonymous visitors by using the collected data to create personalized ads and offers, increasing the likelihood

of converting visitors into customers. It also facilitates lead generation by collecting data from anonymous visitors and using it to create personalized landing pages and forms, which can increase the chances of a lead sharing their contact details with you. With these capabilities, a CDP can assist with lead scoring. This involves tracking anonymous visitor behaviour, qualifying leads based on that behaviour, prioritizing them, and targeting your sales efforts more effectively. Thanks to these features, you gain valuable insights into your website visitors and improve your marketing and sales efforts.

Step 2: Consideration

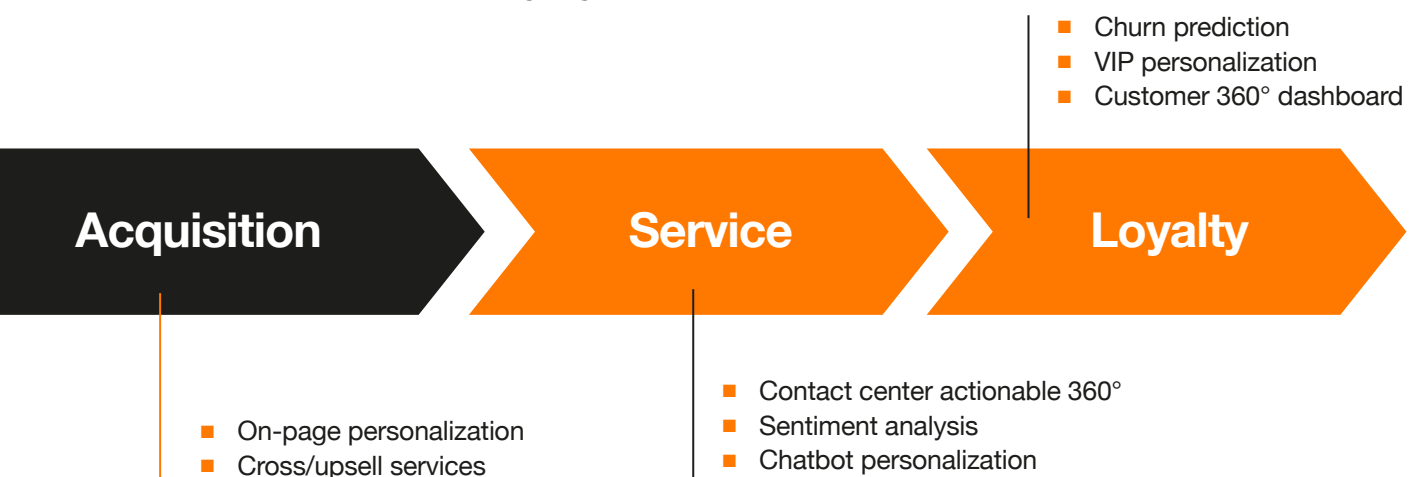
Because a CDP gives you better understanding of each individual customer's preferences and behaviour, you can create personalized product recommendations based on their browsing and purchase history. This increases the purchasing chance and improves overall customer satisfaction.

It also enables campaign optimization. By analysing customer data, a CDP helps you understand which marketing campaigns are working and which are not, so you can optimize your efforts for maximum ROI. This is achieved by analysing customer behaviour data and engagements. Geolocation is also a possibility, as some CDP vendors include mobile integration functionalities and geolocation event triggers, enabling profile enrichment and location-based customer journey personalization. Omni-channel retargeting of

both owned and paid channels is another common use case a CDP can help with, leveraging the three main pillars of collection, processing, and activation to enhance the customer experience.

Step 3: Acquisition

At the acquisition stage, a CDP can increase personalization possibilities by proposing relevant additional services linked to specific products. It can also personalize offerings based on predicted behaviour, such as with a customer who is a frequent buyer who utilizes a specific delivery method for example. A CDP can draw up the data to prefill this selection and make the experience more enjoyable for the customer. Here a CDP also helps you cross-sell and upsell products and services too, using the same personalization capabilities.



Step 4: Service

A CDP can help you drive enhanced customer service and support. Understanding each customer's preferences and behaviour can drive enhanced overall CX and increased customer satisfaction. This comes in the shape of faster resolution times built on having a complete overview of each customer's interactions, or proactive support, where your CDP helps you identify at-risk customers and target retention efforts more effectively.

Step 5: Loyalty

A CDP also enables loyalty initiatives. Churn prevention is one area it can add value, by analysing customer activity and identifying clear churn triggers like a customer searching your FAQs to stop a subscription. It also lets you offer VIP personalization through segmentation and data collection capabilities, meaning you can identify and personalize the customer journey experience for high-value customers and also manage upselling based on customer wants and lifecycle management. Personalize upselling based on specific desires and lifecycle management are some other great examples.



78% of marketers feel that real-time data is a “must-have,” not a “nice to have”

– DataStax

CDP: Key functionalities



Time to market

All relevant customer data is centralized into an actionable 360° customer profile. This combined with having one solution for segmentation building can help dramatically decrease your time to market on new customer journeys.

Channel consistency

With its integration capabilities of both inbound and outbound channels, a CDP succeeds in a key marketing goal: being able to offer customers a true, consistent, omnichannel experience.

Marketing analytics

The way a CDP collects and processes customer data helps increase efficiency. Areas like channel attribution, dark and known funnel customer conversions and even AI modelling can all be analysed in greater detail. Some CDP solutions offer this built-in, others with exporting capabilities to link it back to your broader enterprise reporting stack.

Things to remember

- Do not think more MarTech solutions are better – simplicity is your friend
- Compare platforms and make an informed decision about which is right for your business
- Embark on a use case based phased journey that maximizes your data now and for future use cases
- A CDP offers all the functionality you need for taking new marketing initiatives to market quickly and effectively



Customer success stories

Success story #1:

Optimized, personalized CX at premium coffee manufacturer



The challenge

The company, a global coffee market leader, has prioritized building harmonious and personalized relationships with customers across different channels and countries. It has always leveraged cutting-edge technologies to achieve this as part of its marketing and customer relationship strategies.

The company wanted to build a personalized journey for customers through different points of contact with the objective of:

- Centralizing customer information across different departments
- Creating a 360° customer view across brand and channels
- Better understanding of customers and a fully personalized journey
- Accessing a state-of-the-art campaign management and orchestration tool

Despite having a diverse range of marketing technologies, the company was unable to succeed because the customer data was siloed and did not effectively connect these technological aspects together.

The solution

Orange Business worked with the company to ensure all campaign management processes were centralized in a single solution. In the first phase, we worked with the company to ensure a stable IT environment that could be used by all its sales teams worldwide. Our experts also supported the marketing teams in the implementation of campaigns by offering 24/7 availability, knowledge library creation and sharing best practices across markets as a service.

In the second phase, Orange Business reworked the company's CRM architecture including:

- Building a better flexible and operational maintenance of new services requests in order to design and implement new features, such as channels, gamification, APIs
- And end-to-end approach built on data and digital that encompassed the power of data science and the organisation of data governance
- Support for CRM architecture and CRM enterprise design around campaign orchestration to ensure the overall consistency in the CRM ecosystem with Adobe

Finally, we guided the company in global deployment of the Adobe Experience Platform (AEP) to its sales teams in countries around the world to ensure a smooth implementation and ramp-up. Focus was on change management, development of use cases, and development of new skills.

The results and benefits

Benefits the company has enjoyed include:

- By eliminating data silos, this approach enabled true personalization and facilitated a better understanding of customer behaviour, which resulted in improved customer engagement and loyalty.
- Additionally, the centralized and real-time segmentation that this approach enabled led to a drastically reduced time-to-market for omni-channel campaigns and journeys, resulting in better overall marketing performance and ROI.
- Finally, the strong combination of local and central change management approaches created a strong buy-in among stakeholders, helping to ensure the success of the program.

Success story #2:

Driving personalized CX from data at a major financial services company

The challenge

Financial services companies are often frontrunners in MarTech adoption but don't always make the most of their data. And finserv companies generate a lot of data: they work at large scale and have regular, ongoing interactions with customers through payments and more.

On average, this company's customers access their banking app 35 times per month. That presents a huge number of touchpoints on the journey for it to exploit and enhance CX. Factor in that finserv customers are going into physical branches less and less, and the importance of maximising customer data was clear.

Overall, the company wanted to:

- Evolve from a product-centric approach to a customer-centric approach
- Evolve from mass communication to one-on-one conversations
- Transform balance of inbound and outbound activities



The solution

Orange Business worked with the company to gain a full oversight of its data to make the best possible use of it and drive ongoing conversational marketing. When companies are struggling to use their data, we start with first principles: what data do you have, how can we help you use it better, and how will you drive value for your customers from it? This included:

- Creating centralized customer profiles
- Real-time and centralized decision engine to define next best offer and next best action
- Real-time, complex customer journey orchestration in omnichannel model covering cross-channel banner advertising, leads to agencies and contact centre, mass communications
- Continuous testing and measurement via sales attribution



The results and benefits

- 1,4 million of regular active users, grown at rate of 10% year first years after the implementation of the solution.
- 1 billion personalized messages in real-time
- Boost in relevant communications across product ranges resulting in lower customer frustration, improved CX
- 30 million mails, 38% read

Orange Business guided the company in shifting its customer engagements to drive a more personalized way of engagement. This has shifted the marketing focus away from the product towards the customer's needs.



Success story #3:

Pulling it all together and powering marketing at major food company

The challenge

This leading European producer of dietetic and organic food products has numerous international and local sub-brands under its umbrella. It distributes products via multiple channels and, as such, generates masses of customer data across multiple brands. However, the data was typically scattered and siloed, and the company lacked a “golden record”, a one, true, 360-degree view of its customers and their activities. This was counter to its strong brand reputation and high expectations of its marketing activities.



Only 14%

of organizations have achieved
a 360-degree view of the customer
(Gartner)

The solution

Orange Business worked with the company to gather customer data from across its 30+ brands and data owners throughout the organization. The end goal was to leverage the company's data to drive every possible bit of extra value for consumers without retailers being involved. This required a real 360-degree view of the customers. Solution included:

- Set up and deployment of a customer data platform (CDP)
- Creation of a full customer 360-degree view built on wide variety of supporting data quality
- Consent management as a key pillar of the platform
- Omnichannel enablement through centralized CDP
- Cloud-based solution to reduce CAPEX

The results and benefits

- Dramatically increased customer data quality through centralized cleaning, duplication and merging rules
- Marketeer-friendly low-code environment
- Reduced time to market for marketing activities
- Positive impact on CAPEX costs



Maximizing your CDP chances of success

Working with the right partner is key to successful CDP implementation. But there are other best practices you should follow.

Between 2021 and 2022,
marketer interest in CDPs
increased by

32%
(Gartner)

Change management

- Internal change must be carefully managed

Governance

- You must ensure there is organizational alignment, top-to-bottom cooperation in CDP adoption throughout your company

Integration

- Your CDP must be integrated at all levels of your company, so be sure to do sufficient internal preparation in advance.

Data quality

- Ensure the data you select is the best qualified data available

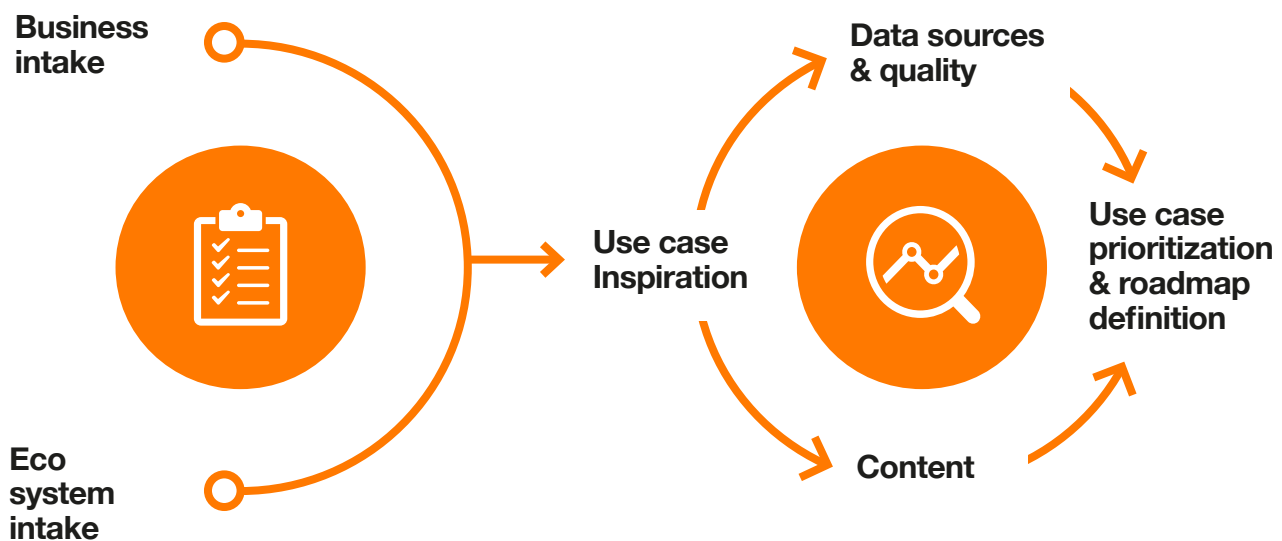
The Orange Business implementation approach

Step 1 Intake

We work from a “funnel” perspective, which begins with a business and solution intake with the aim of identifying and evaluate your “as is” situation and then establishing “to be goals”, where you want your CDP to take you to.

Step 2 Analyze

Next, we take a deep dive into our analysis and discuss a wide variety of CDP use cases across multiple verticals. We also assess and analyse key elements intrinsic to the CDP’s success, such as data sources and their quality and content. Then, we formulate and put in place a defined roadmap of prioritized use cases.



Use case driven approach

Our methodology starts with assessing your business from the top down, followed by a deeper dive into how you're using your customer data. We then work with you to implement your CDP on a use case-driven basis to deliver fast and maximum value to your organization.

This methodology focuses primarily on an implementation approach. To ensure optimal results aligned with your company's needs, we recommend conducting an assessment before proceeding with CDP implementation. This assessment primarily encompasses the initial two steps of our methodology, followed by a thorough technological analysis to identify the most suitable CDP for your organization. As a vendor-agnostic consulting firm, we are dedicated to providing guidance within the expansive CDP technological landscape.

Step 3

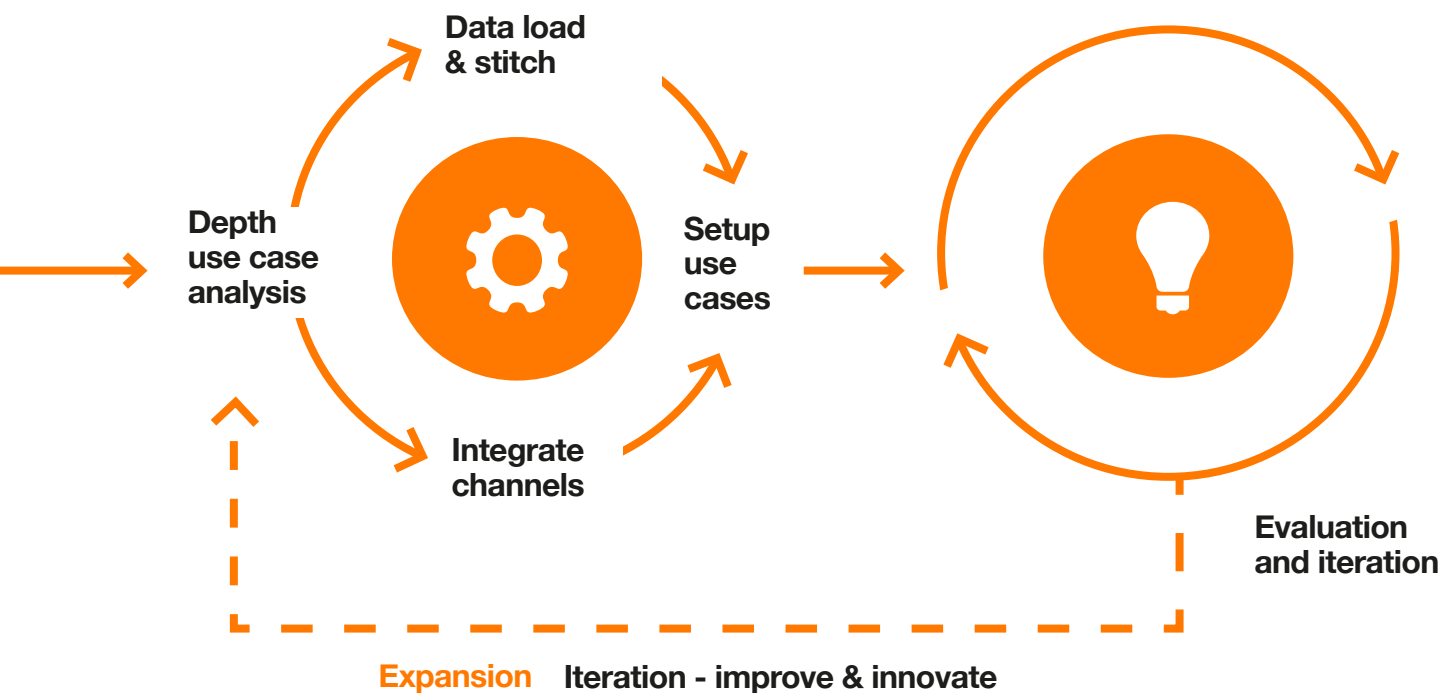
Implementation

In our experience, the most successful CDP implementations are use case-driven. This allows you to create instant value and facilitates the buy in across the organization. At this step we expand your CDP implementation, carry out a detailed analysis of use cases and identify the most important ones. We integrate your CDP with your channels and establish a continuous setup for growth.

Step 4

Insight

Here we work with you to continuously improve and expand the use cases that have been identified to drive ongoing value to your business and the CX you deliver.



Conclusions

Maximize your CX and marketing activities with a CDP

A CDP is a powerful solution that empowers your marketing activities in unprecedented ways to deliver an unparalleled CX. Because it seamlessly integrates and unifies data from all your inbound and outbound channels, a CDP ensures your customers receive a consistent and personalized experience across every touchpoint. Whether they are browsing your website, receiving an email, or speaking with a customer service representative, a CDP ensures that your customers feel understood, valued, and unique at every stage of their journey.

A CDP empowers you and your organisation with true cross-channel personalization that sets your marketing activities apart from your competitors. It makes you better equipped to address your customers, by creating unified customer profiles, eliminating data silos, increasing data privacy and compliance, increasing efficiency. A CDP helps you to truly know your customers and gain that crucial unified view of their needs and behaviours and give them a continuously enhanced CX. It could be the best money you ever spend.

Why work with Orange Business?

Orange Business is the world's leading management consultancy and system integrator for data intelligence and digital experience. We are data-native artists, using an agile, use case-driven approach. Thanks to our multidisciplinary digital and data capabilities, we ensure that our missions are executed thoroughly and meet the highest standards at every step. We manage expectations from all stakeholders, from the team responsible for data governance through to the content marketing designer.

A CDP implementation is a prime example of requiring a combination of digital and data capabilities. Our data governance expertise empowers you to maximise control and usability of your data assets and put them at the centre of your services and strategic projects. Together with our data science and AI expertise, our consultants provide you with state-of-the-art solutions leveraging machine learning (ML), predictive analytics, statistics, deep learning, natural language processing (NLP), computer vision, and more to help you put your data into action open up a world of possibilities.

1. We have a proven track record of success working in data-rich industries such as finance, retail, consumer products, and travel and transportation for over 15 years.
2. Thanks to our consulting expertise, technical knowledge, and implementation skills for advanced customer experience (CX) ecosystems, our customers consistently rank among the top 5 digital players in their industry.
3. Our years of experience in CDPs means we are specialists in building real-time customer profiles, using decision logic to trigger personalized offers and actions through various channels. We drive personalization on multiple customer data aspects to deliver unique customer experiences. Customer Data Platform is just one area of marketing technology solution that Orange Business has designed and worked with for many years.
4. Thanks to our vendor-agnostic approach, we can integrate both with our own and partner channels to deliver tailor-made experiences, setting us apart from the competition.

Orange Business can help you make your CDP journey as smooth, efficient, and transformational as possible. For more information, please contact: marketing@bd-orange.com
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Orange Business CDP Experts:

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Do you have any further questions?

Or if you would like to know more about how to improve retail customer relations on the basis of customer DNA, do not hesitate to mail us your query.

Digital Services

Orange Business, part of Orange Group, is one of the world's leading management consultancies and system integrators for Data Intelligence & Digital Experience. We are Data Native Artists who leverage a unique combination of technical, functional and industry specialization, as well as partnerships with key software vendors, to deliver state of the art solutions since 1992. As a front runner in Big Data, Artificial Intelligence and Digital, Orange Business is enabling customers to innovate, drive their business strategy and improve customer experience through effective use of data. Clients choose Orange Business as their strategic Data & Digital partner due to our pioneering vision, expertise, core values, quality of service & our passion for delivery.

**Find out more how
we can help you with
your projects on:**

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