Behind The Curtain:
How Preference Management Should Look & Feel From Inside the Enterprise

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For the American consumer, preference selection is an everyday occurrence. We unsubscribe from email lists, change our privacy settings on Twitter, request home refinance quotes via email and "like" our favorite brands on Facebook. Subtle or obvious, the act of engaging with businesses in order to improve our interactions has become ubiquitous and expected.

And rightly so. In an always-connected world full of technological advances never imagined five years ago, let alone 15, consumers are in control. They have the power to drive the conversation and they choose products and experiences that feel like them and speak to their core drivers.

With that in mind, CMOs know that preference collection — the process of learning unique consumer characteristics, such as product interest, communication channel of choice and frequency of communication — is an important way to give customers what they want and should be seamless and easy for prospects and customers.

But what about preference management from inside the organization? What should take place on the other side of the website preference center, phone call or email campaign?

There are five key principles that can enhance engagement, speed the sales cycle and vastly improve marketing ROI. If one or more are missing, it may be a sign that your preference management strategy is not delivering on its complete potential.

Here are the five foundational principles of preference management from the other side of the interaction:

1. Preference management must be centrally located.
Preference management should be a central repository connected to all departments, units, regions and appropriate applications. Effective engagement is all about listening to and learning from your audience as a single entity — not a siloed and segmented bureaucracy. When information isn't available across the enterprise, customers are exposed to inconsistent or even contradictory experiences.

2. It must be comprehensive to the consumer.
Preference collection should take place across the full spectrum of prospect and customer interactions. Enterprise-level businesses engage in complex interactions that often feature an expanding set of personal

and virtual interactions. It's essential to collect and react to information from all touchpoints such as call centers, social media and mobile devices, not just the easy or inexpensive ones e.g. email or websites.

3. Preference data should be made available across the internal enterprise.

Ideally, preference data should be made available to inside sales applications, support systems and marketing databases so your team can use the best and most appropriate tools for the interaction at hand. A separate application that is not integrated and requires secondary research or recording slows productivity and leads to cross-discipline confusion.

4. Preference management needs to be future proofed.

Preference management processes should be flexible enough to incorporate new applications, transition to new CRM systems and integrate with a variety of data sources and activities. If your preference management strategy is inextricably tied to (or built as part of) a specific application, it will only be as useful as the life of that application or CRM system. It's a time-bomb approach that creates an even more painful transition when the time for a transition inevitably arrives.

5. Success depends on flexibility.

Preference collection, maintenance and distribution should be tailored to your unique business rules and circumstances, not pre-set features and outputs. In order to truly own and capitalize on engagement, preference management must align with your unique structure, needs and sensitivities. A solution that limits your collection points or predetermines how and when information is shared can shift overall strategy and conflict with overall initiatives and benchmarks.

Ultimately, a robust preference management solution shouldn't really look or feel like a "solution" at all. Instead, data should flow into your normal processes and applications, empowering your team to engage with customers and prospects instead of searching for help or guessing at answers.

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