Decisioning: marketing’s game-changer

Your guide to mastering decisioning
Goodbye yesterday’s interactions.
Hello inspiring experiences.

Introduction

The era of price and product is over. The new battleground for customer attention is experience.

With the battle in full swing, brands are embarking on a frenzied dash for personalisation. They want to live up to emerging customer expectations by delivering inspiring, exciting and reassuring interactions that flex in the moment and leap from channel-to-channel.

Real-time, omnichannel and 1:1 have become the buzzwords of the moment, but one word is conspicuously missing: decisioning. It shouldn’t be. Without it, this kind of smart interaction is impossible.

But what is decisioning? Why is it such a game-changer for brands looking to win in this age of experiences? And how can you master it?

This guide explains all.

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About Boxever

Boxever is a personalisation platform that uses data and AI to help the world’s biggest brands make every customer interaction smarter and deliver game-changing customer experience.
Decisioning - or decision management - is a technique that blends big data together with business rules and predictive analytics (or analytical models) to make smart decisions about what to talk to customers about, and where, at any one time.

Boiled down, decisioning is a technique that blends data, rules and predictive analytics to make smart decisions about what to talk to customers about, on what channel, at any given time.

It has been on the scene for a while now - marketers have been working with tech and data teams to optimise communications delivered in specific channels for some time. But they’re only scratching the surface of decisioning’s potential. It’s decisioning with the handbrake on.

We see decisioning as something much more fundamental and ambitious.

It’s a technique that, enabled by huge leaps forward in AI and machine learning, stretches beyond channel boundaries to deliver smarter interactions across every touchpoint that flex in the moment. Crucially, it sits at the heart of how a business creates, implements and refines customer strategy.

Getting it right is both an art and a science - a blend of organisation, human ingenuity and technology. It is this holistic, expansive understanding of what decisioning really is that’s set to drive huge benefits for customers and business.

2020

The year customer experience will overtake price and product as the key brand differentiator (Walker).
The number of consumers that retract their loyalty more quickly than three years ago (McKinsey).

41%
The number of consumers that switched companies in 2017 over a lack of trust or poor personalisation (Accenture).

8X
The ROI personalisation delivers on marketing spend (McKinsey).

LISTEN TO YOUR CUSTOMERS
Decisioning helps you truly understand - and respond to - how your customers are engaging with you. It might, for example, show that customers aren’t opening emails you’re sending them, empowering you to switch approach and drive 1:1 conversations on inbound channels.

MAKING THE CASE
Over the last decade, rapid improvements in technology have gone hand-in-hand with spiralling customer expectations. One has continually propelled the other.

The result? As customers, we expect the best experiences we get with one brand to be replicated everywhere. We want engagements on our terms only: where we want them, when we want them. We want experiences to be fast, convenient and connected. And, above all, we want to spend time with brands that show they know us through personal, relevant experiences.

Brands offering anything less are dicing with irrelevance. No business can deliver any of this - certainly not any scale - without mastering decisioning to harness customer data and orchestrate its tools and channels to influence every customer interaction and journey. It is decisioning that makes each one specific, personal and relevant.

Better, smarter interactions bring obvious bottom-line benefits: increased brand loyalty, marketing ROI, revenue and profitability; more efficient, effective and engaging campaigns. But mastering the technique brings three wider, deeper benefits, too.

A NEW LEVEL OF INSTANT, ACCURATE FEEDBACK
It’s tempting to think of decisioning as being about what information you pump into the outside world, when and to whom. But a good decisioning operation is much more: it’s constantly listening and feeding insight back into the business.

It constantly monitors how your customers are responding to your communications. Your marketing, data and operational teams will benefit from a granular view of what each of your customers (or customer groups) make of every moment spent with you. You’ll be free to pursue a truly customer-first strategy.

SUPER-CHARGED AGILITY
A well-run decisioning operation will be completely in tune with the needs of your business, 24/7/365. And when it is built into the fabric of how you deliver strategy, it will empower rapid evaluation and dynamic improvement.

That adds up to a new level of business agility and a quicker path to innovation. If you need to change the strategic focus (from, say, margin to revenue or reducing churn) or respond to external events beyond your control (perhaps acts of god or regulatory change) it can help you adapt quickly. Without decisioning, change can feel like turning an oil tanker. With it, it can feel comparatively instant.

MAINTAIN THE BALANCE
Critically, decisioning makes sure you can balance the needs of the business with the needs of the customer.

While it may sound deceptively simple, it’s imperative. It means you won’t lose sight of what resonates with customers as you push through a business change, or your business objectives as you drive CX improvements. Result? You’ll reach your objectives more quickly and efficiently, with less risk.

The case for decisioning
HOW DECISIONING CAN TRANSFORM CAMPAIGNS, MARKETING AND YOUR BUSINESS

Since 2016, rapid improvements in technology have gone hand-in-hand with spiralling customer expectations. One has continually propelled the other.

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What’s Stopping you?

THE BARRIERS STANDING IN THE WAY OF MAKING DECISIONING COUNT

There’s a problem: businesses aren’t structured or built to deliver all this. The lack of preparedness stretches way beyond technology: from being bogged down in a mass of spreadsheets and the unrealistic promises of sales-focused vendors to being put off by the perceived complexity, a range of challenges stand in the way.

A LACK OF UNDERSTANDING

The biggest barrier to fully-fledged decisioning is usually a misguided belief about what it really is, or can be. It’s not surprising: it’s a relatively new technique, and there are very few examples out there of it done well. Most of us simply haven’t been exposed to the potential for joined-up 1:1 interactions.

Most businesses haven’t seen a realistic vision for how to get there, either. Vendors often muddy the water by selling decisioning as a piece of tech that optimises engagements in just one channel. In these cases decision makers think their business has mastered decisioning when, in reality, they’ve been playing at the edges.

THE LACK OF A CUSTOMER-FIRST MINDSET

Being “customer first” - that is, understanding what is important to your customers, and making that the driving force of your business - is far easier to define than it is to achieve. All too often approaches rely on applying old ideas based on long-held, often un scrutinised habits or objectives - like sending more emails or showing more offers.

For decisioning to hit its potential, companies need a change in mindset that rebalances CX efforts away from entrenched business thinking and towards adding greater value to the customer. Take today’s received wisdom on contact centres, for example, which suggests it’s an outmoded channel and the prime objective should be cost reduction.

There’s an alternative: to see it as a channel that plays a specific role in your CX mix, and use it as a means to develop two-way conversations that cultivate genuine relationships and drive loyalty.

A LACK OF EXECUTIVE BUY-IN

Mastering decisioning means placing it at the core of how a business drives its strategy forward. This obviously requires buy-in at the very highest levels and, without it, businesses struggle with three critical things: structuring the business for decisioning; empowering those responsible for it to drive change; and getting access to the data it requires.

Sadly, executive buy-in isn’t as common as it should be. Sometimes this is caused by a conservative “it’s not broken, so why fix it” mentality or a lack of understanding about the potential benefits. Some leaders have become disengaged having been taken in by outrageous promises from vendors and purchasing limited tools. Elsewhere, many have been made wary by high-profile privacy issues or the perceived threat of personalisation getting “too creepy”.

A LACK OF EXECUTIVE BUY-IN

Over-reliance on traditional segmentation

While one important benefit of decisioning is the ability to unleash 1:1 interactions, segmentation still has a clear place in the marketing mix. Decisioning and segmentation should in fact work hand-in-hand, each one supercharging the other.

But for many marketing teams segmentation alone reigns supreme, and is viewed separately to decisioning. For those teams, stepping beyond segmentation presents an unnecessary risk - or even a distraction from efforts to make more traditional methods work efficiently in the first place.

Siloked data, technology and teams

Siloked data, technology and CX objectives are the enemy of good decisioning: they limit what’s possible. In a siloked world, you might be able to optimise the imagery or copy customers receive in one channel, for example. But if you want to go beyond that, things get messy. Processes become inefficient because teams don’t share objectives and tools can’t talk to each other. The best outcomes can’t be achieved, and the business has no visibility of what’s working (or isn’t).

The emperor’s new clothes factor

A nascent, emerging martech market is filled with new tools that over-promise and under-deliver. Optimisation tools that claim to deliver leading personalisation straight out the box - without acknowledging the need for deeper change - hold back real progress.

A lack of CX leadership

Decisioning needs to be a whole-business enterprise if it’s going to reach its full potential. To achieve that it needs: the foundation of a clear, actionable CX strategy that is embedded in all parts of the business; and a clear CX owner empowered to drive the strategy through.

All too often this foundation is missing because businesses don’t make conscious, strategic decisions about what CX needs to achieve and who should lead it. Delivering CX - and therefore decisioning - is frequently assigned to a “default” team, rather than the right one.

Traditional organisational structures

The modern customer no longer thinks in terms of channels. So why do businesses? Traditional organisational structures were built for a different age and tend to be focused around channels. This creates arbitrary divisions, conflicting objectives, overlaps and inefficiencies. This kind of siloed thinking embeds some very human issues including unproductive competition between teams and a fear of change among team leadership.

What’s Stopping you?

The proportion of marketing executives who believe their team “gets” martech. Half consider skills gaps to be a barrier to success.

#1

Organisational siloes are the number one problem for companies looking to increase integration and improve CX (Harvard Business School).

25%

The number of organisations who still have no-one in their business dedicated to improving CX (Customer Experience Professionals Association).

Next best action

Next best action takes the “right-time, right-place” mantra to the next level. Fuelled by AI and machine learning, it blends a customer’s past behaviour with actions they’re making “live”, operational data and your business goals to identify the most effective action to take next, in what channel, in real time.

Critically, next best action isn’t limited to merely suggesting products or offers. Whether it’s recommending service actions, messages, content or a bespoke campaign, it makes sure you stay in tune with your customers’ needs, interests and priorities while pursuing your business goals.

The result? Higher value interactions and deeper engagement.
Six steps to mastering Decisioning

01
Think big. Start small

02
Embrace “decision first”

03
Structure your business for CX

04
Treat decisioning as a system of operations

05
Get the right skills onboard

06
Get the right tools
A GOOD PLACE TO START...

Run an internal workshop with representation from across the business to establish the building blocks. Establish clear CX goals and unpick the basic principles of decisions, offers and actions in response.

DECISIONING IN ACTION

Fast-track the right customers through your IVR system. You might prioritise customers you know are about to use a service, for example, or "VIPs" with large social influence. You can also use next best action to empower agents to deliver the highest levels of personalised service by intelligently selecting actions that build deeper customer engagement.

Think big, start small

It’s easy to look at the sheer scale of what you’re trying to achieve and not know where to start. That’s why we’re big believers in the power of starting small. Organisations used to build to change. Now they build for change. Lay the groundwork before you tackle the bigger questions.

Transformation is an overused buzzword. Don’t see the path ahead as one, big digital project: progress is best made through constant innovation, experimentation and refinement rather than big leaps forward. Think, crawl, walk, run.

Focus on experimenting with decisioning first, beginning with use cases closely aligned to business needs. These early initiatives will pay for themselves, so don’t worry about being perfect: find the data, team and tools that work for you. Once you’ve proved the value you’ll be in a different conversation and be best positioned to build a case for increased investment or deeper change.

Think about...

- Adopting a start-up or disruptor mentality. Start with a small team ring-fenced from the rest of the business as a lightning rod to build the case for change. Make sure it has C-level backing
- Embedding an agile test, learn, throw out, double down mantra that favours iterative approaches. Do it by giving early teams and projects the freedom to fail and prove out assumptions - fast
- Starting with just one or two early use cases, aligned to existing strategic objectives. Agree what good looks like with critical internal stakeholders and communicate clear, tight metrics
- Making sure early decisioning teams have cross-functional support (at least) if not membership (ideally) and one senior sponsor
- Looking beyond the usual "selling" use cases. In our experience solving servicing or service recovery problems is a great way to build advocacy not just with customers, but also the internal leadership team
Establish roles and responsibilities early on. Marketing, for example, provides the vision and direction for the model. IT outlines and provides the tech and data provision (eg. latency). Analytics take ownership of how the model is built, refreshed, and when.

React to service issues with a more precise, delicate touch by suppressing inbound and outbound marketing communications to those affected until the issue is resolved.

Leave received wisdom, old habits and historic marketing objectives at the door. Effective decisioning starts with embracing the bigger picture: a crystal clear understanding of your CX objectives.

Being “decision first” means focusing your approach first and foremost on the needs of your business and your customer, unrestricted by how you’ve done things previously or what you perceive to be possible.

When previously you might have taken your available resources - data, for example - as your start-point, think bigger picture first. You can turn to gathering the resources you need to deliver it afterwards.

Who you’re talking to, and the best thing to talk to them about. Next best actions are those that add most value to the customer

Making sure your thinking is unbiased by old expectations and ways of working. Start with a clean slate, taking your customer and business objective as your start point

Developing early a clear, pragmatic view on how a decisioning model can be achieved collaboratively with key cross-functional stakeholders, who work together from day one

Developing a 12-month roadmap to move forward the most critical use cases with the highest potential ROI
A GOOD PLACE TO START...

Establish the building blocks of good CX governance by gathering key stakeholders together (commercial, operational, digital and channel leaders) in a cross-functional steering group. Gather and combine strategic imperatives, reach a consensus on what the business should be talking to customers about and build a framework for arbitration between teams. Bring it all together in an agreed strategy, managing performance through monthly steering group meetings.

DECISIONING IN ACTION

Within just eight weeks our decisioning engine and services helped a leading Asia Pacific airline generate €4.5m through Intelligent Cart Recovery, boosted revenue by €2.1m through urgency messaging and increased ancillary revenues by €450k.

Structure your business for CX

Traditional business structures aren’t built for a customer focused world and, in many cases, actually prevent the kind of joined-up, collaborative thinking needed to help decisioning achieve its potential.

In an ideal world, decisioning is backed by an organisation structured around how customers think and behave. Those structures are focused on interconnected, flexible teams, each with a clear stake not only in CX, but also in a clearly defined strategy.

These structures are incredibly rare. Today most businesses exist somewhere on a spectrum between traditional models (where responsibility for CX is scattered across existing channel teams, each with overlapping roles and responsibilities) and more progressive models that centralise ownership of CX, decisioning and all channels in one place.

Embedding organisational change isn’t straightforward. It takes tough conversations, hard decisions and investment - to say nothing of a willingness to challenge the status quo. Thankfully, you don’t need to wait for change to move forward with decisioning. The short-term alternative is putting sensible cross-team governance in place to align the business and provide a framework for progress. Your structure can evolve at its own pace.

Think about...

- Whether your organisational structure mirrors the needs and behaviours of your customers, and how it helps or hinders joined-up CX approaches
- Assessing where your business is on the maturity scale: from entrepreneurial, experimental thinking on CX backed by good governance through to a business that is structured around an engrained decisioning first approach
- Drawing up a long-term plan for organisational transformation to embrace a more progressive structure that eliminates siloes, removes overlapping or contradictory roles and objectives, and aligns the business under one CX strategy
- Taking short-term steps to empower progress in the short to medium term. Putting the right governance structure in place is easier to achieve than organisational change and can be very effective
A GOOD PLACE TO START...

Make sure you can clearly articulate your company business plan at departmental level. It needs to be actionable and relevant to all so that decisioning planning and campaign refinement remain focused in the day-to-day.

DECISIONING IN ACTION

Personalise decisions about how to compensate customers during service recovery with next best action. An airline looking to compensate a family with a high air miles balance might send toys for the children rather than more yet rewards as an apology, for example.

Treat decisioning as a system of operations

At its best, decisioning is completely in-tune with the needs of your business. Because it empowers rapid evaluation, change and improvement - and allows you to adapt plans as situations shift - it can sit at the heart of how your business delivers its strategic objectives.

Realising those benefits relies on creating new ways of working around it, however. It’s not just another marketing technique. You’ll need teams, structures and processes to monitor results, measure outcomes against a set of clearly defined KPIs, filter findings and recommendations up and down the business and commit to refinement on a continuous cycle.

Think about...

- The structure, feedback loops and processes that will allow the continuous refinement of decisioning to reflect departmental and business-wide strategic objectives
- Putting a big focus on measurement. Without it, you won’t be able to demonstrate the difference your campaigns are making and refine them appropriately. You’ll struggle to demonstrate the value to senior stakeholders, too. Make sure you have an analyst experienced in attribution at the appropriate part of your system of operations
- Embrace qualitative and well as quantitative data as you evaluate campaigns. How are customers and colleagues reacting?
A GOOD PLACE TO START...

Introducing processes and culture that encourage collaboration - critical to successful decisioning. While you build a team and business structure for decisioning, do what you can to encourage teams to work together.

DECISIONING IN ACTION

Make your customer communications hyper-relevant, useful and mobile. By combining geofence technology with historical and contextual customer data you can deliver timely localised and personalised offers - at the times and places that matter most.

Get the right skills onboard

Decisioning requires a range of people and teams with an emerging set of skills. But as the full implications of it continue to unravel, businesses need to stay flexible.

Building consistent, joined-up customer experiences across all channels requires new kinds of multidisciplinary teams.

But it also requires today’s specialists adapt to the new model. Decisioning demands they are flexible enough to understand the potential and limitations of big data, business rules and predictive analytics. Marketers, for example, can’t set the direction of travel for decisioning models or refine campaigns if they can’t combine new IT skills alongside the traditional ones.

Think about...

— Hiring marketers and IT professionals not for the skills recruits have now, but for their capability to learn and grow as expectations change. In the fast-paced, ever-changing world of decisioning, you might not know what you want to achieve in the medium term

— Blending marketing knowledge and technical know how. In our experience this empowers teams to move fast and develop a build, measure, learn philosophy

— Recruiting “marketing technologists” who are as comfortable with predictive analytics, next best action and decision tables as they are with traditional campaigns into your teams of the future

— Do you have the right blend of skills in place to get early projects off the ground? Decisioning requires a cross-functional team of specialists: data scientists; IT professionals and engineers; and marketers and marketing technologists
A GOOD PLACE TO START...

Work out how prepared you are for decisioning by assessing your existing tech stack in the round. Can you easily access your data to inform future decisioning models? Where is AI currently being used - and where isn’t it? Is there any duplication in your AI models, and do they counteract each other?

DECISIONING IN ACTION

Our decisioning engine and services helped a leading consumer brand in the Americas deliver $1m, in incremental revenue within one week. In the longer term improvements in customer experience have led to a 60 per cent increase in Net Promoter Score.

Get the right tools

Technology is the canvas on which decisioning plays out. You need the right tools to do a complex job, for a large range of internal stakeholders, now and in the future.

Think about...

— How to unify more than just data. While unifying data has become commonplace, most tools struggle to unify decisioning. If you want to deliver joined-up interactions across channels, select API-first tools that easily integrate into your stack and bring your business rules, logic and predictive analytics together in one place

— Picking tools that “democratise” decisioning, giving everyone - whether data scientist or marketer - the ability to create, test and tweak decisioning models

— Technology that empowers and encourages two critical pillars of decisioning: collaboration; and an agile, test and learn approach

— How to future-proof yourself. Technology is in a state of constant change, so avoid vendor lock-in and keep your decisioning technology channel, model and logic agnostic. That way you’ll be able to pursue best of breed in the long term

— Beware of point solutions that sell “black box”, off-the-shelf optimisation as decisioning - you’ll quickly reach limits in capability and won’t be able to quickly leverage tomorrow’s analytics and data science
Taking the next step

Businesses looking to unleash decisioning to make big strides forward in customer experience need to take some bold steps - and answer some big questions.

- Do we have a clear CX strategy that is relevant to every team?
- How can we balance organisational transformation with short-term decisioning “wins?”
- Who should hold ultimate responsibility for CX?
- How can we dismantle siloes and boost collaboration?
- Do we need to make changes to organisational structure, operations, or reporting?
- How does our current stack measure up? What help do we need?

Boxever is on hand to help. We’ve empowered some of the world’s biggest brands embrace decisioning and lead in CX, so whether you’re making your first tentative steps into the world of decisioning or are looking to improve an already successful formula, we’d love to talk.

Drop us a line.

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Boxever is a personalisation platform that uses data and AI to help the world’s biggest brands make every interaction smarter and deliver game-changing customer experience.

We do all this in two ways. Firstly, we build rich and accurate profiles of their customers using data from across their business. Then we use AI to automate decisions about how to personalise interactions on every channel and in every moment - all in real time. From website to email and from SMS to contact centre, Boxever decides the what, why, where and when.

The result? Personal, relevant and valuable experiences for customers that lead to improved engagement, lower acquisition costs and accelerated conversion for the business.

We’ve been helping companies revolutionise how they engage customers since we were founded in 2011. Seven years on, we’re now recognised by Gartner as a leading player in personalisation and ranked by Forbes alongside Google, Apple and Amazon as one of the most powerful examples of AI in use today.

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