

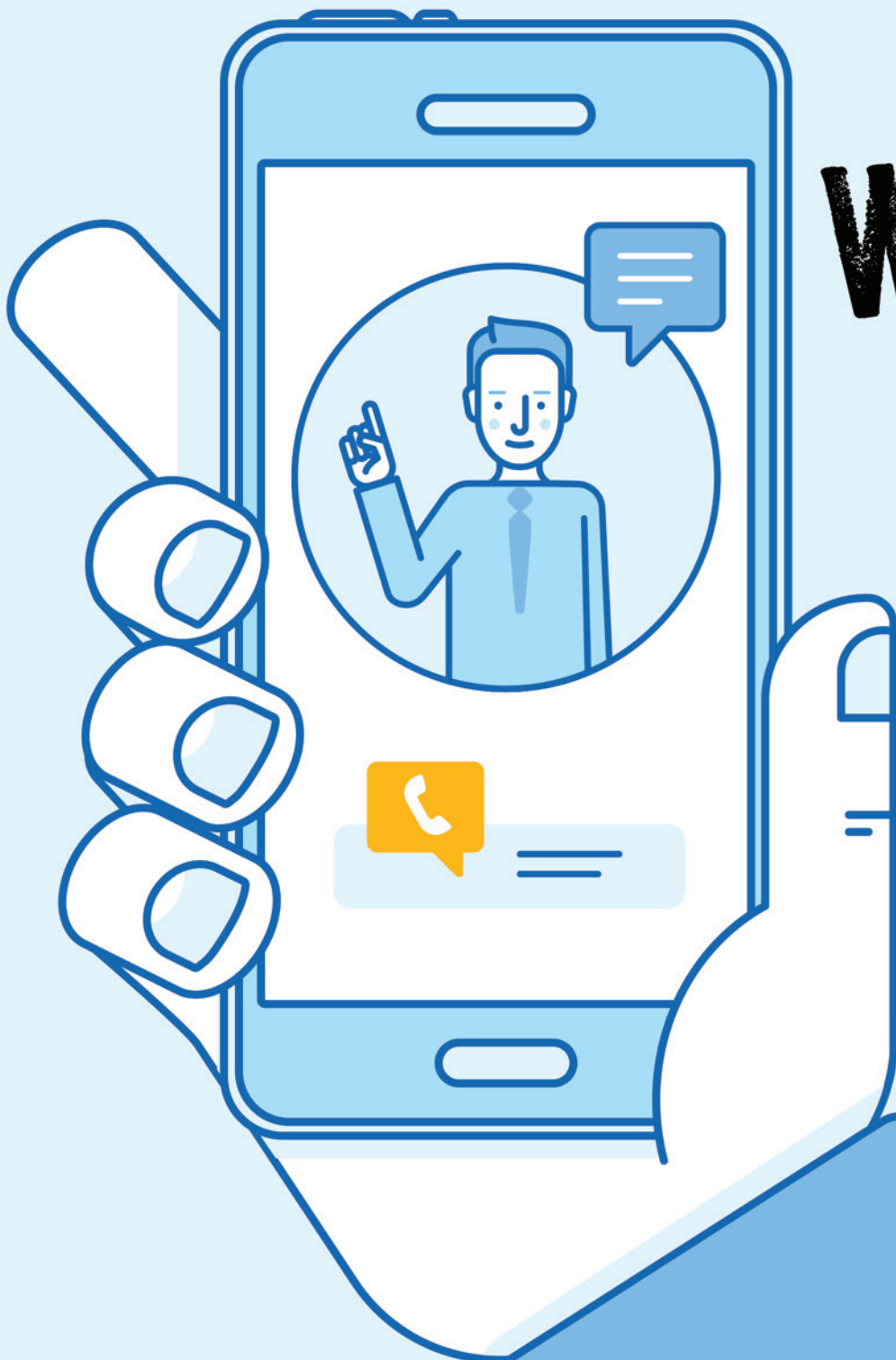
# CRM

CUSTOMER RELATIONSHIP MANAGEMENT

> Pulling Maximum Benefit  
From a Partner Ecosystem

> Making It Personal for  
Every Customer

> Emotion and Management  
Are Key to CX Success



**WebRTC  
+ CRM  
= Better  
Customer  
Support**

To get the most out of web-based real-time video, voice, and file and screen sharing, companies must link the functions to their systems of record

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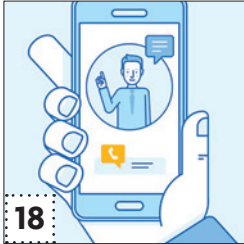
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# Let's Resolve to Do Better with Our Data

I recently got an email from one of our CRM vendors offering me a 60-day free trial of its data-cleansing software. In what the company called an “end of the year nudge,” it offered to help me clean up my Salesforce.com records to eliminate duplicates, mistakes, and other little buggers that could corrupt my daily routine.

The email suggested that I make this my New Year's resolution instead of trying to lose weight, wake up an hour earlier, or something else that takes too much effort. Clean data might not be as brag-worthy as hitting the gym more often or giving up one of my many long-held vices, but the email promised that by cleaning up my sales database I could be assured that nothing would rob me of a strong finish to 2017.

Sounds good so far, right? But here's the problem: The email came addressed not to me directly but to a former member of *CRM* magazine's editorial team who hasn't been on staff since June 2013. The email also failed to take into account that as editors, we typically don't have to worry about quotas or end-of-the-year sales goals.

It seems to me that the company making the pitch hasn't been following its own advice. Not only is its contact list grossly (four and a half years) out of date, but the database is not segmented properly to reflect the roles and titles of the people contained therein. The vendor's marketing folks might want to take a look at their own New Year's resolutions before telling me what mine should be.

But all kidding aside, the company's suggestion needs to be taken seriously. I suspect that the majority of company databases are just as much in need of a good cleansing. Doing it now will set you on the right course as we start 2018.

We all know that customer data deteriorates rapidly; in three years or less, most information is no longer valid. By failing to keep customer and prospect records up to date, you could be throwing money away by attempting to reach people who will never see your pitch. The best, most carefully crafted

email could easily wind up bounced into oblivion by a spam filter or, even worse, in the trash folder of someone who was never intended to receive it.

A clean and up-to-date database is a crucial element in every good marketing and sales campaign. Well-maintained customer information is the linchpin for personalization, as this month's feature “Making It Personal for Every Customer” (page 28), by Assistant Editor Sam Del Rowe, points out. “Personalization efforts are only as good as the data used to craft the right customer experience,” the article maintains.

That also means knowing how customers prefer to be contacted. The right data could mean the difference between reaching customers on the channels they prefer and missing the mark on channels they never use.

Accurate and up-to-date information is just as important to good customer service. After all, “the ability to have a unified view of customer data and interaction history is critical,” notes Associate Editor Oren Smilansky in this month's cover story, “WebRTC + CRM = Better Customer Support” (page 18). Armed with the right information, agents can better handle each customer's unique situations and concerns.

But it's also important to note that accurate and current data is only valuable if company employees, automated systems, and business partners can access it at the right time. That requires a tight integration between all front- and back-office data warehouses and other systems of record.

At the end of the day—or in this case, the end of the year—proper data management is but one small part of a much larger endeavor that starts with a firm commitment to making data a priority. No data cleansing service provider can bring about that kind of cultural change for you, so you might want to consider making it your very own New Year's resolution.

LEONARD KLIE  
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BY FAILING TO KEEP  
CUSTOMER AND PROSPECT  
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MONEY AWAY.

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## How to Avoid the 7 Deadly Sins of Customer Experience Transformation

*Customer experience programs often start out full of promise, but they can be easily plagued by these bad habits. Here's how to steer clear of them.*

**EWAN DUNCAN**, SENIOR PARTNER, MCKINSEY & COMPANY'S MARKETING AND SALES PRACTICE

## Going Global: Guidelines on Opening a Successful European Sales Office

*There are a variety of issues to consider before launching a European office, and chief among them are practical, yet crucial, concerns—timing, location, and regulations. Part one of a two-part series.*

**DEIRDRE MORAN**, VICE PRESIDENT OF EMERGING TECHNOLOGIES, IDA IRELAND

## The CRM State of the Union: It's Time for Empathy with the Customer

*With consumers now in control of the conversation, businesses must start approaching the customer as a lifelong relationship that needs to be nurtured.*

**ANTHONY SMITH**, FOUNDER AND CEO, INSIGHTLY

## With CRM and B2B E-commerce, the Sum Is Greater Than the Parts

*Seamlessly integrated CRM and e-commerce can unlock tremendous value, driving efficiency, superior customer service and experience, and sales growth.*

**YOAV KUTNER**, COFOUNDER AND CEO, ORO

## 4 Steps to Creating a 360-Degree View of the Customer Journey

*Organizational buy-in and journey analytics are crucial, as is this step: having a meaningful conversation with the customer.*

**SUNIL RAO**, VICE PRESIDENT OF AUDIENCE ANALYTICS AND DMP PRACTICE, AND **ETHAN HANSON**, ASSOCIATE DIRECTOR OF ADVANCED METHODS AND RESEARCH, MERKLE

## 3 Ways to Take the Risk Out of Buying a CRM System

*Not every business needs the most advanced tools. Here's one do and two don'ts to keep in mind before you go software shopping.*

**NATHAN KONTNY**, CEO, HIGHRISE

## Modern Sales Reps Need Digital Tools—Lots of Them

*The proliferation of data is just one of the challenges of an increasingly sophisticated sales landscape, and salespeople need all the digital help they can get.*

**CLINT ORAM**, CHIEF MARKETING OFFICER, SUGARCRM

## Data Integration Can Help Retailers Ring in the Holiday Shopping Season

*Make sure all of your systems give the gift of sharing data this year, because no one wants a present delivered in January.*

**JAVIER JIMENEZ**, PRESIDENT, MAGIC SOFTWARE ENTERPRISES AMERICAS



# Dynamic Sales Coaching Can Help Your Players (Sales Reps) Win

*Leaving your coaching to an informal process at the discretion of managers will lead to blown deals*

HAVING RECENTLY attended and presented at several sales conferences, I'm hearing the buzz around sales enablement, sales transformation, sales optimization, etc., getting louder and louder. Faced with ever-increasing revenue goals, more global competition, and higher customer expectations—just to name a few things keeping sales leaders awake at night—companies are looking for ways to increase sales efficiency and effectiveness.

What I found interesting at these events was most of the conversation revolved around what *salespeople* are going to have to do differently. Clearly, they are part of the equation. But so are the people leading those sales teams, and I do not think enough thought is going into what *sales managers* are going to have to do differently as well. That is a serious error, and let me explain why.

Forgive the sports analogy, but if you think of salespeople as the athletes on the field playing the game, then sales managers are the coaches. Their role is to help those athletes perform at their best. So how are they doing that? To answer that question, we asked the more than 1,200 participants in CSO Insights' "2017 World Class Sales Practices (WCSP)" study to share with us the approach their company used to coach their sales teams.


We found that 34.7 percent of firms left the when/how of coaching up to the discretion of the individual sales manager, and another 35 percent stated that they had an informal coaching process in place. A formal coaching

process had been adopted by 19 percent of the survey participants. Finally, 11.3 percent of sales organizations took coaching a step further and implemented a dynamic sales process, defined as a formal process combined with CRM capabilities in place to monitor, evaluate, and support that coaching process.

When I see a wide range of opinions on an issue, it always raises the question of whether it really makes a difference which option you choose. The chart at the bottom of the page shows the results of an analysis of the WCSP study data looking at the win rate of forecast deals with regards to

the coaching approach taken by a company.

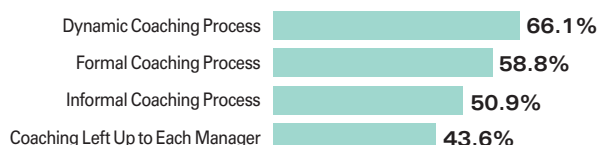
The answer to the question is crystal clear: It makes a big difference, and the nearly 70 percent of firms surveyed that are taking a random or informal approach to sales coaching are making a fundamental mistake. And while we should applaud the "formal process" adopters for getting their act together, they are still not achieving their full potential, because they're not going a step further and involving CRM technology to enable the coaching process.

Looking at the CRM landscape, I have had a chance to review solid options to support turning a formal coaching process into a dynamic one. Core CRM solution providers like Salesforce.com, Microsoft, Oracle, and others have been making significant strides in implementing sales management dashboards and analytics. Other firms, like Revegy, 5600blue, and Xvoyant, have been enhancing their sales performance management platforms. Emerging AI solutions, like the ones covered in my September column ("Salespeople Face an Uphill Battle, and AI Is Ready to Help," page 6), can also have a big impact here. So as we approach 2018, it is time for a New Year's resolution for sales management to formalize how you are coaching your sales teams—and leveraging technology to make it happen. 

*Jim Dickie—Independent research director and cofounder of CSO Insights, a Division of Miller Heiman Group—specializes in benchmarking CRM and sales enablement initiatives. He can be reached at [jimdickie@icloud.com](mailto:jimdickie@icloud.com) or on Twitter at [@jimdickie](https://twitter.com/jimdickie).*



## Coaching Impact on Win Rate of Forecast Deals





# Rethinking Workforce Optimization

## USING NEW TECHNOLOGY TO DRIVE BETTER CUSTOMER EXPERIENCES

Delivering a better customer experience is a top priority, and organizations, especially their contact centers, are constantly searching for ways to improve it. Since agents play a key role in shaping the customer experience, it's important they receive proper coaching and are equipped with the right resources to deliver top-notch experiences. So how can you ensure your agents are prepared and empowered? The latest advances in workforce optimization (WFO) can dramatically impact agent performance and help improve the customer experience. Let's take a closer look.

### 1. QUICKLY EVALUATE INTERACTIONS WITH AUTOMATED QUALITY

Real return on investment comes from your ability to quickly identify deficiencies and focus on improving agent skills. What if you could automate the time- and resource-intensive manual evaluation of calls, expand the scope to encompass all calls, and shift some of your resources from scoring the calls to helping improve agent performance instead?

Automated quality solutions can help you achieve these goals. They can enable you to quickly, easily and objectively evaluate every recorded call to ensure agent-customer interactions are aligned with your service parameters and expectations for script adherence. By autoscoreing a much greater number of calls, you can get a better understanding of your agents' performance and take appropriate action – in minutes, not weeks – to automatically assign coaching exactly when and where it's needed.

## 2. INCREASE ENGAGEMENT WITH INTEGRATED EMPLOYEE SCORECARDS

Going a step further, scorecards can be incorporated into your quality management program to provide a seamless workflow for scoring calls, reporting on and sharing metrics, triggering alerts, and sharing the results of coaching sessions. Agents can gain daily and intra-day visibility

reduced after-call work time, etc.

Correcting behaviors as they are flagged can contribute to providing a better customer experience.

## 3. GUIDE AND ASSIST EMPLOYEES WITH ATTENDED AUTOMATION

Attended automation solutions can help agents do their work more quickly and accurately. These solutions provide guidance and automation wizards that overlay the applications used to complete work items. As employees move through their processes and reach a specific step, a software robot can automatically complete portions of the work for them, cutting down the time spent on a specific task. Additionally, these same solutions can also pop up guidance to help them complete their tasks.

By scaling back the amount of time agents spend on repetitive tasks, you can enable them to focus on steps that require decision-making, creativity, and empathy—in turn creating rich interactions and making employees feel more valued.

Let's recap—your agents are among your most valued assets and can have the biggest impact on your customer experience. Why not give them the tools and training to help make their work faster, easier and more engaging? Adding automation into your WFO solutions can help your organization achieve those goals while driving greater customer and agent satisfaction. ■



into their key performance indicators and proactively identify areas for self-improvement. When combined with automated quality, the use of objective, data-driven assessments can inject a greater sense of fairness into the evaluation process. Having this level of transparency can provide agents with a sense of empowerment, encouraging them to increase engagement and self-correct their behaviors. The impact can be significant and may include improved average handle time, first call resolution,

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## Effective CX Measurement Requires a CX Culture

*Customer experience metrics can get in the way of delivering good experiences*

THERE'S A LOT of buzz about artificial intelligence (AI) right now, and when you consider the possible applications of AI in customer experience (CX) measurement, the excitement seems justified. Just think of companies like Affectiva that measure emotions in facial expressions. If we can measure how customers actually feel about their experiences, we can finally measure what matters most to customer loyalty.

But before firms can take advantage of the coming wave of AI-driven innovation in CX measurement, they need to address a fundamental problem in existing CX measurement programs: They too often obstruct customer-centricity.

I speak to hundreds of companies about their CX measurement initiatives and find that they are running into the same trap: They try to get employees to pay attention to CX by focusing on the metric, but many aren't set up with the right culture. Organizations with this issue are bound to fail, as CX metrics and incentives actually start to get in the way of delivering better experiences.

Research from experts like motivational researcher Carol Dweck and behavioral economist Dan Ariely explains what's going on. CX metrics have the same problems as reward charts for kids: They work in the short term, but leave kids (or your employees) less able to make the right decisions in the long run. That's because CX metrics without the right culture lead to:

**Navel-gazing.** Companies measure in department silos, a situation that creates poor experiences across end-to-end customer journeys that cross silos.

**Myopia.** Metrics often favor short-term wins—which are easily quantifiable—at the expense of longer-term customer goals.

**Score obsession.** Employees end up spending a lot of energy on improving a score. It's never a great customer experience when somebody begs you for a 10. Score-obsessed employees are likely to become cynical and lose the sense of pride in their work, a sure way to destroy any chance of becoming customer-centric.

Customer-obsessed companies embrace metrics differently, and when Forrester Research asked them about the metrics they use to drive customer obsession, we learned that it's not the metrics—it's how you use them.


Instead of thinking about metrics as a crude-force way to achieve better CX, CX leaders embrace the customer life cycle, power long-term trade-offs, and create a culture

of accountability. Let's take each in turn:

**Embrace the customer life cycle.** Metrics must embrace the customer life cycle instead of being siloed and internally focused. For example, Pitney Bowes moved past siloed metrics to embrace the customer perspective. Its global client operations group analyzed its problem-resolution process and found that three departments were involved in solving certain problems for customers. But each department had its own separate efficiency goal, and the inefficiencies that these conflicting goals caused led to longer time-to-resolution for customers. Pitney Bowes assigned a common goal across these departments, which shortened resolution time and achieved a better end-to-end CX.

**Power long-term trade-offs.** Firms must build systems that create trade-offs so that they don't optimize for short-term goals over the long-term benefits of customer obsession, like increased loyalty and incremental revenue. To do this systematically, executives should use a balanced scorecard, a tool that balances short- and long-term financial and customer outcomes with internal processes and employee capabilities. Metrics in each dimension of the balanced scorecard need to be focused on the goal of customer obsession.

**Create a culture of accountability.** To elevate customer obsession, businesses cannot stop at the first two traits. They need to make employees accountable for delivering on CX while enabling them with training and tools to assume that accountability. Ingredion, a global manufacturer of sweeteners, starches, nutrition ingredients, and biomaterials, did this very well. The firm defined a shared goal—to create value for customers. The CX team then worked with functional stakeholders to cascade the overall goal into cross-functional goals and functional scorecards. To cement accountability, Ingredion bases 10 to 30 percent of employees' personal goals on these metrics, with lighter weighting for back-office employees and higher weighting for customer-facing roles.

Help your company to be a leader that instills a sense of purpose and gives employees the autonomy and self-efficacy we as human beings need to feel motivated. This will enable your employees to make the right, customer-obsessed decisions—even when nobody is looking. 

*Maxie Schmidt is a principal analyst at Forrester Research serving customer experience (CX) professionals. She leads Forrester's research on CX measurement programs, advising clients on building effective measurement programs and innovating CX measurement practices beyond surveys.*

# Business Intelligence & Analytic Solutions for Deeper Insights

There is a revolution under way in the world of analytics and business intelligence as access to data is “democratized” and individual corporate stakeholders can get their hands on the wealth of insights it reveals.

As analytics becomes easier for users to deploy, collaboration between departments is strengthened and the practical applications of these newfound insights proliferate as new perspectives are included in the information loop.

The rise of business and data analytics is rapidly encouraging a “data culture,” one that will fundamentally transform the way organizations make decisions.

### Bob Fernekees

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# Business Intelligence: Better Use of Data to Make Smart Business Decisions

Data is everywhere, and if used correctly, it can improve how your organization conducts business and achieves important goals. In today's environment where an inexhaustible number of applications, databases, and other repositories are storing and transacting data, it can be difficult for businesses to identify and use data to their advantage.

Smart organizations are using business intelligence tools, artificial intelligence, and analytics capabilities to illuminate insights about business activities and trends. By applying effective technology and process methodologies, organizations can create a major competitive advantage with those insights. In an economy increasingly driven by information, knowledge is power, and those who use that knowledge most effectively will be best equipped to compete.

Analyst firm IDC predicts that more than \$203 billion will be invested in data and business intelligence solutions by 2020. While that represents a staggering amount for a single type of enterprise functionality, it reflects the necessity not just of analytics functionality, but also of the opportunities that come from that data. In particular, organizations that develop strategies for their business intelligence and analytics activities can see major improvements in organizational decision-making, the creation of new business channels, collaboration, and the ability to predict business trends.

Let's look at these 4 elements in more detail to understand how insights from our data can deliver major advantages.

## 1. DECISION-MAKING

Data is only usable if you can see it and manipulate it for the needs of your business. At the heart of any data tool is the analytics component which can help to create meaning out of all the data you're collecting. Based on logic defined by business users, data can be integrated, processed, and rendered to provide anything from very general overview information (percentage increase in closed sales deals by geographic market, for example) to highly specific data sets (some combination of closed deals based upon supporting

marketing activities, amount spent on lead generation, and time to close).

From that information, users can adjust business plans and modify investments. Data can be displayed against different goals, which can be used to provide decision-makers with a variety of potential options, empowering decision-makers to take action and pursue the most effective paths towards achieving business goals. This enables the organization as a whole to be more agile in day-to-day decision making processes.

## 2. MONETIZATION

Data can generate some surprising results. Companies uncover important discoveries about markets, customers, and trends in the course of their data mining, and when they do, they can capitalize on them to create new business opportunities. Business intelligence, therefore, acts not just as a delivery tool for data, but as an engine for translating that information into ways of creatively developing profitability strategies.

Armed with insights about the state of their business, organizations can use that data for customer retention strategies, competitive differentiation, more effective partnering efforts, and creating new digital channels.

Consider the advantages when a product team can sit down with data that reflects not just where their market has been, but predicts where it's going. That can only be generated through an effective business intelligence solution and with analytics functionality.

## 3. COLLABORATION

Most typical enterprise software solutions are designed for interaction with users at the individual level. The purpose is to identify useful information and put it to work for their unique needs. Effective business intelligence solutions, however, change the dynamic of business decision-making because they encourage collaboration among different stakeholders, both inside of the organization and with third-parties.

The data derived from analytics and intelligence solutions is rendered in an interactive and shareable dashboard which acts almost like a common language among users. The entire organization can standardize on specific goals and identify how different teams are contributing to those goals. Armed with that kind of data and the ability to communicate more clearly with it, the process of reaching goals can be adapted to better increase the potential for success.

## 4. PREDICTIVE

While many applications can provide "if-then" scenarios, they typically only make use of the data being transacted within their own application. Business intelligence and analytics can combine functionality to accurately identify important trends that can predict business outcomes.

By dynamically building models from data across the organization and from other stakeholders, users can see estimates based on real-time data. This can lead to better engagement with customers and help improve how products and services are developed. An organization with usable predictive capabilities gains a major competitive advantage over those operating on unstructured data.

Most organizations go about the business of collecting data, and they fall short when it comes to integrating, analyzing, and effectively applying it. With effective use of data analysis through business intelligence, enterprises can use their data as one of the most effective elements of their competitive toolkit. ■

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# BI as a Destination Is Dying

We're on the verge of something big. Trends are converging right now that could signal a substantial step forward—a whole new phase of business intelligence (BI): The Third Wave.

## SOME HISTORY

BI started with monolithic stacks, reliable but inflexible. It was the era of the data rich and the data poor, where those without access to data starved as they waited (and waited and waited) for someone to finally have time to help them.

That frustration led to the second wave: a revolution toward a hodge-podge of disjointed self-service tools where users grabbed whatever data they could lay their hands on and threw it into data cleansing, blending, and visualization tools for analysis.

But that revolution came at a cost. For all the advantages of do-it-yourself analysis, the tools created a mess of silos that didn't talk to each other, and you lost the ability to speak in a common language with anyone else at your company. You could no longer trust that your interpretation of the data was the same as your colleagues'. Enter data chaos.

The Third Wave of BI represents something new: The Data Platform. Where users can access whatever data they need, from one central source of truth that provides a shared language for the entire company.

## THE THIRD WAVE OF BI

This is where the magic comes in. When people are no longer starving for data, new potential opens up in what they can imagine doing. Data becomes how you do your job, not just how you

measure it with dashboards. BI, as we know it, dies.

Once the technical and knowledge barriers break down, the responsibility of looking at the data moves beyond the BI team. Everyone can start asking and answering their own questions and integrating data into their everyday workflows.

Data is no longer just a place to find answers. It's the place where ideas originate. With every employee looking at the same numbers, sharing the same truth, they're able to collectively make smarter, more informed business decisions.

## THE DATA PLATFORM

The key constraint that defined those first two waves—slow, expensive databases—is gone. The big data revolution brought a lot of hype, but one thing of value it delivered were fast, cheap analytic databases (many of which even migrated to the cloud).

These systems are so fast and so cheap that you no longer have to extract your data to analyze it. You can do your analytics right in the database.

This radically shortens the time it takes to get from a new question to an answer. All the data is already in one place, it's always fresh, and just one tool integrates data from different sources and governs the meaning of that data.

Data platforms allow business users to explore in a truly self-service way, with data governance baked right in. What's more, modern software practices mean that in a data platform, business processes dictate the tools, not the other way around.

Cobbling together a bunch of siloed, single-purpose tools that don't communicate with each other will not feed the masses. But, when the hunger for data is sated, it then becomes second nature to start asking more questions and expect to see data behind every decision. *Then your culture changes.*

## THE DATA-DRIVEN CULTURE

The "Data culture" is the idea of everyone in an organization is using data to make informed decisions rather than guesses based on a hunch or loud opinion.

For this to exist, data has to be part of the very fabric of your company. Every employee, in every department, needs access to a comprehensive view of the data. Then, the assumption is that every argument can be backed up with data.

When you put data in the hands of every person, not just the CEO or the CFO, it allows anyone to ask and answer their own questions with confidence. Workplaces are constantly connected. And this new workforce wants to use data to look for new efficiencies and new competitive opportunities to push the company to the next level.

Fundamentally, the thing that's changing isn't the way companies do BI. It's the way they do business. They're throwing out the old way of guessing at a solution, then checking next month's report to see how things turned out. They're moving to true, iterative, agile data cultures. ■

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BY PATRICK GIBBONS

## B2B Companies Are Falling Behind in Customer Experience

*They're failing to deliver on three key customer demands*

IT'S FAIR TO SAY companies have recognized the power of customer experience (CX). Think of the great lengths businesses have gone to provide features such as one-click ordering or same-day delivery. We at Walker predicted this in our 2013 report "Customers 2020," in which we revealed a rise in the influence of customer experience and a decline in traditional methods of differentiation based on products and price. It appears we got that one right. CX is now widely considered one of the best ways to establish a competitive advantage.

However, it's clear that not all companies have caught on. In particular, new research shows business-to-business (B2B) firms are not keeping up with these trends.

### WHAT'S REALLY IMPORTANT IN B2B?

With 2020 just around the corner, our firm decided to update our study and check in on how well B2B companies are doing in preparing for the soaring expectations of customers. We found three evolving expectations that stand out over all others:

- **Personalization.** There is no average customer. Customers want companies to know their individual needs and are willing to tailor the experience to meet them.
- **Ease.** An explosion of information, connected networks, and options have led to little patience for complexity. Customers place a real premium on simplicity.
- **Speed.** Time is of the essence. Customers can't afford to wait around while their business issues are being considered. They value companies that provide real-time responses and proactively anticipate their needs.

Customers are increasingly clear on what they want and how they want it. B2B customers see the benefits of these elements in their personal life as retail consumers, and they expect similar results in their professional lives.

### AN UNSATISFACTORY REPORT CARD

Just how well are B2B companies preparing to meet these demands? According to them, not well. CX professionals

at B2B companies rated their organizations on personalization, ease, and speed, and they clearly see shortcomings. Fewer than 10 percent consider their company to be very effective at delivering on these critical customer expectations. What's more, nearly one third of them indicated their company was not very effective (see figure).


This presents a conundrum for B2B companies: With customer interactions increasingly complex, how do B2B companies address customers' changing needs?


### CATCHING UP

So here are a few ideas on how B2B companies can catch up with their B2C counterparts:

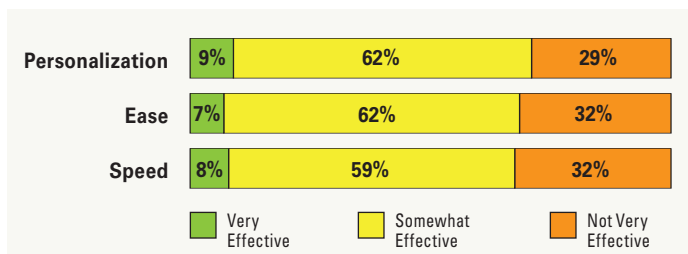
- **Shift the culture.** CX leaders have long since recognized they can't do everything on their own. They need engaged employees who are committed to making the way they do business faster, easier, and more personalized. For most companies, this requires an intentional shift to a more customer-centric culture.
- **Break down silos.** In many B2B companies, customers get passed from one function to another—sales passes to installation, which passes to account management, which involves customer support, and so on. This approach might help the company, but it causes a disjointed experience for customers. Companies need to break down the silos and provide a more seamless experience.
- **Embrace and manage change.** Companies need to prepare and enable employees to successfully adopt a customer-committed attitude in operations, one initiative at a time. They need to go beyond a "project" mentality to understand the customer's perspective, realizing the benefits of customer-focused change.
- **Innovate the experience.** Too often companies think of innovation in terms of products and features. Instead, led by CX professionals, they should design innovative, ideal experiences that are more personal and make it easier and faster for customers to do business with them.

None of these steps are easy. They require various levels of sweeping change with support from company leadership. However, given the report card, sweeping change might be what's needed.

Here's another idea: Consider the three primary expectations—personalization, ease, speed—and pick one. Get started. Do something. Customer expectations won't slow down, so B2B leadership needs to speed up. 

Here's another idea: Consider the three primary expectations—personalization, ease, speed—and pick one. Get started. Do something. Customer expectations won't slow down, so B2B leadership needs to speed up. 

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## Emotion and Management Are Key to CX Success

*Companies need to deliver emotionally positive experiences and use CX management*

There is a customer experience (CX) leadership gap that hasn't closed in a number of years, Forrester Research reported in its 2017 U.S. Customer Experience Index, because companies haven't been making the vital emotional connections their customers want.

The report ranked 314 companies across 21 industries and found that most are stagnating when it comes to CX: Scores for the top 5 percent of companies in the entire index—identified as elite brands—stayed flat.

Companies simply haven't been spending enough time thinking about consumer emotions and how they tie into the overall customer experience, says Rick Parrish, Forrester's principal analyst serving customer experience professionals and author of the report.

In the report, Parrish identified emotion as essential to CX success, with elite brands delivering an average of 17 emotionally positive experiences for each negative experience, and the lowest-performing 5 percent of companies providing just two emotionally positive experiences for each negative one.

"We identified three dimensions of every customer experience: emotion, ease, and effectiveness; and emotion is the most important," Parrish explains. "You can have the easiest, most effective customer experience in the world,

but unless it has the right emotional quotient, people won't think it's great. Companies don't get that, and even the companies that do don't focus on it. You have to focus on emotion or you won't have a good customer experience."

An emotionally positive customer experience is one where the customer feels good about the experience, but "it's not just as simple as like or not like, happy or sad," Parrish cautions. "There's much more nuance to it than that. Positive emotions differ depending on the industry, the touch point, [and] the customer's goal. When you walk out of Disney World, you'll have a very

*"When you walk out of Disney World, you'll have a very different emotional reaction than you do when you walk through a really good TSA checkpoint."*

different emotional reaction than you do when you walk through a really good TSA checkpoint—both positive emotions, but very different ones."

To succeed at CX, companies should also focus on what Forrester calls CX management, according to Parrish. That involves the following six competencies:

- **Research**—developing an in-depth understanding of customers and communicating it to employees and partners. This can be done using both quantitative methods (surveys and web analytics) and qualitative methods (interviews and ethnography). And when completed, companies should summarize findings and share them across the company.

- **Prioritization**—focusing on what's most important for customer experiences

and business success. This involves identifying and ranking the most important customer groups, journeys, and interactions and then allocating company resources based on what matters most to customers and the company.

- **Design**—defining and refining experiences based on an overall vision and a research-based understanding of customers. This requires both quantitative and qualitative research and should involve generating ideas, prototyping, and testing many times before deciding on a final design.

- **Enablement**—ensuring that employees and partners have the resources they need to deliver the right experiences. Companies should provide all employees with the training, information, and tools needed for their roles and then confirm via direct observation that the company and its partners provide or support the intended experience across all touch points.

- **Measurement**—quantifying experience quality and connecting it to broad organizational metrics. This step requires companies to track and analyze customer interactions, how they perceive those interactions, and what they do as a result, and then sharing those insights with employees and partners.

- **Culture**—fostering shared values and behaviors that promote the delivery of great experiences. This means educating employees about customers, the CX vision, and their roles in that vision, while also reinforcing customer-centric behaviors with routines, celebrations, and rewards aligned to CX metrics.

"Most of the time, when companies provide good customer experiences, they do it very inefficiently or they do it accidentally," Parrish says. "But if you want to provide great customer experiences reliably and improve in a systematic and efficient way, you have to get good at customer experience management." —Sam Del Rowe

# There's Untapped Value in Voice Biometrics

*Identification and verification technologies can help companies improve customer experience and mitigate security threats*

While voice biometrics can serve as a valuable addition to any company's contact center technology stack, many service organizations are still wary of them, according to a report from Opus Research.

Organizations that use voice biometrics offer a better customer experience, thanks to increased ease of use, reduced costs per call, and stronger overall security, according to Ravin Sanjith, intelligent authentication program director at Opus and author of the report. They also tend to "strengthen their relationships with callers," because agents no longer have to "interrogate" them with security questions, Sanjith says.

Instead, voice biometrics compares current utterances with stored voiceprints and often runs in the background without the customer ever knowing that such activity is taking place.

"In the case of human-assisted calls, the dialogue with the agent becomes a lot more cordial and focused on service fulfillment rather than security," he adds, thus eliminating a common frustration of customers around having to repeat details they've already provided.

Voice biometric technology has already proven its worth in the financial sector, with companies like Barclays, Wells Fargo, Citi, and Vanguard already boasting successful deployments, according to Sanjith, who notes that the same applies to the telecommunications companies Vodafone and Swisscom. Millions of people have voluntarily created voiceprints for these companies, which also saw investment returns within their forecasted periods.



However, many company leaders—and customers—still haven't overcome fears regarding the use of technology for contact center authentication.

"For many years, voice biometrics had been associated with speech recognition, which had a somewhat jaded performance history," before the advent of Siri, Cortana, Alexa, and Google Voice, Sanjith says. There is a difference, he adds: Voice biometrics serves to identify speakers, not recognize their speech, and people have had trouble distinguishing between the two.

Many of the holdouts are also still afraid that recorded voice audio files can be collected and used for identity theft. This concern is not totally unfounded, given that voice biometrics, like any other security factor, is not entirely bulletproof, but it has been exacerbated by undue media coverage, according to Sanjith.

Another concern about voice biometrics is that it operates according to

probability, unlike PINs, passwords, or tokens, which require 100 percent matches. That, too, is a legitimate concern: Even today, systems are still not totally foolproof: False rejects, where the system denies access to the right people, and false accepts, where the system grants admission to the wrong people, still happen, but they are far less likely than when the technology was first introduced.

Biometric engines have been operating with accuracy rates of greater than 97 percent since 2014, Sanjith maintains.

Adoption increases will continue in coming years. Opus has already charted hundreds of implementations and expects adoption to grow at a 15 percent compounded annual rate through 2022.

However, adoption is still not where it could be, despite the fact that the technology "has been improving in quantum leaps," thanks to advancements in deep neural networks and machine learning, Sanjith says.

Voice biometrics adoption will also get a boost from an expanding base of use cases, including text-dependent self-service, text-independent agent-assisted service, and fraud watch lists, according to Sanjith.

The technology's weaknesses, he says, can be easily overcome by multi-level solution architectures, proactive internal awareness, and efforts to educate customers. Senior executives must also be able to distinguish between "high-profile" and "high-impact" risks.

Then, too, solutions must be designed within the context of the overall customer fulfillment use case and not as "point solutions," Sanjith argues, and should be aligned with overall know-your-customer identification and verification processes.

Companies will also need to pair the technology with their interactive voice response, audio streaming, and CRM systems. Organizational planning must also have an owner who will embrace the solution once it moves out of project mode, with regular reporting and optimization efforts, Sanjith says. —Oren Smilansky

# RPA Has Its Upsides

*Robotic process automation has been found to increase operational efficiency and reduce costs*

Many fear that robotic process automation (RPA)—defined by research firm Frost & Sullivan as “the use of software that incorporates technologies like artificial intelligence and machine learning to automate routine, high-volume tasks that are sensitive to human error”—will make human workers obsolete. Another fear—and one that is turning out to be just as baseless—is that RPA will replace existing business process management (BPM), case management, contact center, and back-office systems.

In both cases, RPA enhances what companies already have in place without the need for complex application programming interfaces (APIs) or coding, Frost & Sullivan concluded in a recent report.

Beyond that, RPA gives businesses increased efficiencies and reduced costs, according to the report.

Because automation can complete tasks tirelessly, quickly, and accurately, it lets employees focus on tasks that require emotional intelligence, reasoning, and judgment. And automating routine processes can reduce errors and the number of callers complaining about them.

By removing time-wasting processes and more accurately predicting how long tasks will take, RPA can also improve service-level agreements (SLAs). RPA can also be used to provide human agents with real-time guidance and personalized information to speed up interactions.

RPA can be applied to any number of attended or unattended tasks, working in the background or alongside humans. The technology can be scheduled to perform different tasks on different days or moved around as needed. Systems can be applied in a general way, tuned to specific processes, or configured for specific vertical market activities, and can pull

information from almost any other business system or application.

Other benefits include:

- increased security, particularly when handling sensitive information that could be compromised by human agents or social engineering attempts by fraudsters;
- greater regulatory compliance;
- reduced need to upgrade or replace legacy systems; and
- greater employee satisfaction, leading to less turnover.

“Robotic automation processes can dramatically improve the cost-effectiveness and efficiency of customer care departments,” said Nancy Jamison, digital transformation principal analyst at Frost & Sullivan, in a statement.

“However, it’s important for organizations to have a cross-organizational plan for automation,” she cautioned, noting that RPA “can significantly impact people’s roles and adjacent processes.” Having such a plan would also help organizations see where automation should and shouldn’t occur, Jamison said. —*Sam Del Rowe*

## Get Your **CONTENT** MARKETING on Track ... Or Get Left Behind.



By Theresa Cramer  
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“Resistance may be futile as so-called ‘digital natives’ set trends and increase their purchasing power, but this good-natured book makes the pill a tad more palatable. After all, Cramer cautions publishers, ‘If you’re still resisting custom content, you’re already years behind your customers.’”

—*Kirkus Reviews*

Marketers and brands are eager to cash in on the content marketing craze, but as *EContent*’s Theresa Cramer points out, relatively few firms are doing it well. In fact, while a recent study shows that 90% of B2C marketers now have content marketing programs, just 34% rank their efforts to date as effective. In this book, Cramer’s savvy guidance—drawn largely from incisive profiles and interviews with successful content marketers—demystifies the discipline and presents tactics and strategies that are working today. Cramer offers definitions and background, highlights minefields and misfires, and describes exciting new roles and opportunities for marketers, publishers, and journalists.

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ON THE SCENE: ORACLE OPENWORLD 2017

# Oracle Infuses AI into Its Offerings

*Oracle has added artificial intelligence and data extension capabilities to its core cloud-based CRM*

Oracle has enhanced its Customer Experience (CX) Cloud through the addition of artificial intelligence, the company announced at its Oracle OpenWorld user conference in San Francisco in early October.

“You hear a lot of people talking about AI as being a separate application,” Mark Hurd, Oracle’s CEO, told attendees during his opening keynote. “In the end, what you’re really going to see is AI built directly into each [work case], into each user [case].”

Hurd predicts that AI will come to be embedded “directly into customer retention systems as opposed to exporting data from one of those applications into some AI solution,” and that is a direction in which Oracle hopes to move.

The company last year released Adaptive Intelligent Apps, and this year it improved them with AI capabilities to enable customer service, sales, and marketing professionals to make quicker, better decisions.

Customer service professionals can leverage AI to reduce the amount of time it takes to resolve customer queries. For marketers, AI can sift through customer and business data to understand target audiences and provide best-possible product and promotion offers and analyze campaigns to determine response rates and content engagement. In sales, AI can guide reps to close more deals and prepare them for sales calls with data from live news updates and event feeds. During the sales quoting process, reps can use AI-driven graphical price optimization to offer customers discretionary discounts if appropriate.

A major advantage of Oracle’s CX suite is its ability to use vast and reliable



data to make decisions, according to Jack Berkowitz, vice president of adaptive intelligence and data science at Oracle.

“The Oracle Data Cloud is the world’s largest collection of advertising data,” he said, and it is composed of three pieces: data collected via Oracle’s platform, picked up via widgets placed on web and social media sites; contributions from the more than 1,500 data provider partners, such as Kayak.com and others, which allows companies to create deep consumer profiles; and consortium data, or data collected from companies that hand it over in exchange for data from other companies.

At OpenWorld, Oracle further strengthened its data portfolio by establishing new relationships with a number of business data providers, including Dun & Bradstreet and HGData. The partnerships, Berkowitz said, “provide us with a rich understanding of a business,” including its suppliers and clients,

supply chain vulnerabilities, and other information.

“All this information comes together to inform the AI,” Berkowitz said. “It’s not just about displaying the information; we actively interpret it on the fly.”

Oracle’s Cloud customers benefit from the “connected intelligence” that Oracle pools from its partner ecosystem, which also includes cloud offerings for human resources and enterprise resource planning.

Oracle’s Intelligent Bots also got an AI makeover, allowing companies to leverage multichannel platforms and deep analytics to link customer conversations across bots, mobile and web apps, devices, and websites. Companies can also use AI-infused bots to engage with customers and employees across popular messaging platforms like Facebook Messenger, Skype, and Slack, as well as voice-activated devices like the Amazon Echo or Google Home.

Updates to Oracle’s Mobile Cloud—which uses an AI layer based on machine learning, deep neural networking, natural language understanding, cognitive computing, and knowledge services, dialogue, and context—allow companies to build applications to better engage customers at scale, figure out their intent, and respond.

Also announced at OpenWorld was Oracle’s Bot Builder tool, which allows users to design and train natural language models, outline conversational dialogue flows, and enable channel and enterprise data integration.

With Bot Builder, developers can test bots using an available life cycle management function and access

analytics to see how their bots perform among customers.

The conference was also the backdrop for Oracle to introduce the AI Platform Cloud Service, to help developers create and implement enterprise-level AI services using deep learning to glean insights from enterprise data and improve business processes and user experiences. —Oren Smilansky

With AI, “it’s not just about displaying [business data]; we actively interpret it on the fly.”



ON THE SCENE: DMA'S &THEN CONFERENCE

# Marketers' Roles Are Changing with the Times

*As consumers become more aware, marketing needs to tap into both sides of the brain*

Where marketing was once an art form driven by creativity, instinct, and intuition, modern day marketing is a marriage of art and science that brings together right-brain and left-brain activities for new and improved outcomes, a top IBM executive told attendees at this year's DMA &Then conference in New Orleans in early October.

"Once we could quantify almost nothing, and now almost everything is quantifiable, allowing us to drive outcomes at an unprecedented rate," said Michelle Peluso, senior vice president and chief marketing officer at IBM, during the conference's opening keynote. "We have a much more exciting and influential seat at the table than we've ever had, and that's an honor and a privilege."

But now with that seat secured, marketers need to clarify their roles, she continued.

"We don't want to be advertisers; we want to be storytellers that can engage our customers in meaningful relationships. We don't want to be messaging experts; we want to drive outcomes for the business. We certainly don't want to be just the voice of the customer; we want to compel customers to take action to build relationships and loyalty with the companies we represent."

*"We still have to account for human behavior, but we also have to **factor that into what we can know from a data perspective.**"*

Following that same theme, Alan Schulman, managing director of brand and creative content at Deloitte Digital, said marketing is less about persuasion and more about knowledge proficiency.

Data, once thought of as entirely

foreign to creative people, is undergoing a change. "It's fair to say that the pendulum has swung to the side of the science of marketing these days rather than the art of persuasion. My answer to that is no, it's actually both," Schulman said. "We still have to account for human behavior, but we also have to factor that into what we can know from a data perspective."

The main difference in marketing today is that now, marketers can leverage data to inform and validate ideas before they produce them, ensuring that anticipated success is plausible and likely, he added.

Ronalee Zarate-Bayani, head of global integrated marketing and digital advancement at Hershey's, homed in on the data side of the equation. "Data without actionable insights is absolutely meaningless. Our job as marketers is to drive growth and consumer demand by building brands and representing the voice of the customer throughout our companies. But in order to succeed at delivering on these goals, we can't just capture the data; we have to sift through the noise; we have to uncover the key insights; and we have to make the right decisions that are going to drive our business," she said.

She also addressed the challenge of disruptive technologies. "As we continue to learn about our consumers and understand them, we have to also know that technology is constantly disrupting their lives, day in and day out," she said.

In that environment, marketers need to be agile and able to pivot to quickly meet the needs of consumers, Zarate-Bayani said, noting that marketing today is all about creating moments. "These moments are happening quickly and amid so much more stimuli than ever before," she said. But, luckily, at the same time, technological advances are changing consumer behavior and providing marketers with more data to actually transform marketing models and how marketers connect with consumers "in the moments that matter to them." —*Sam Del Rowe*

## REQUIRED READING

# Unraveling *The Digital Helix*

*To execute successful digital transformations, companies must measure and assess information in new ways*

Digital transformation often means different things to different organizations, but in their new book, *The Digital Helix*, authors Michael Gale and Chris Aarons try to boil it down to a science. Associate Editor Oren Smilansky spoke to Gale to learn more about the key elements shared by the 16 percent of firms that have pulled off the feat of going digital.

## CRM magazine: What kind of research did you do for this book?

**Michael Gale:** We interviewed more than 2,000 executives about what they were doing in digital transformation and how they were doing it. We literally wandered around with 30 organizations for about three years—government organizations and commercial companies—just watching them go through this journey. It was like anthropology meets laboratory science.

## Did you find a formula?

Successful organizations were taking a new approach and often tended to start in customer service, sales, and marketing. We started to trace and match their behavior patterns and actions.

## And what did those companies have in common?

They tend to go slow [in order] to go fast—they spend a lot longer planning, rather than rushing into execution. What these organizations are really good at doing, in every way we looked at it—everything from the way they did social, social service, or new development—is spending a lot of time bringing people into the [fold]. So they've got advocacy, not just within their own groups, but across an enormous range of the organization. They don't assume there's one strategy for success. They get that alternative strategies are [constantly developing]. There isn't one solution that works for everybody, or even that works for you. And they really think hard about measurement; they make sure there are new sets of measurement in place, so that they're not just measuring new things in old ways.

## What success stories will readers be surprised to find in the book?

Hallmark, to me, is one of the shocking stories. It's a wonderful example of how to think [digital transformation]

through at a unique and almost esoteric level. If you look at Hallmark, you go, "What, they do cards—they can't be good!" But their understanding of insight, and of very specific behaviors around a digital product or a paper product, is impressive. It's a super-sensitive Midwestern company—you'd never seen them as leading edge—but they were really smart about what it takes to be successful in a customer-centric, incredibly connected world.

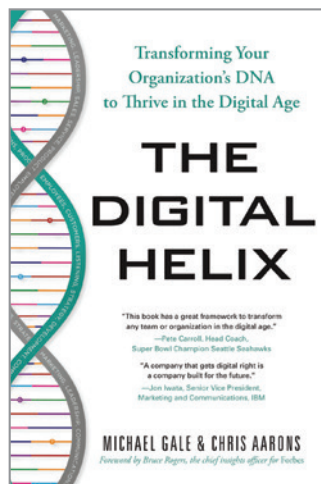
## What impressed you about how Hallmark carried out its transformation?

When you're in the card business, you crowd-source for card ideas. That's not new, they're just very good at it. You load them into various stores, and then you just wait for the numbers to come back from retail—that's been the classic model. Hallmark looks at this stuff every few hours. They are poring over constant insight. It's easy to say, "I'm a fairly remote physical business, I'll wait for my numbers to come back next week." But they're not like that.

They're constantly trying to use insights, not key performance indicators, to drive their business. They know that things shift in the digital world all the time. Some of it is noise, some of it is signal, but their ability to look through new noise and new signals is amazing. Most organizations don't have that sensitivity.

## What key lessons would you like readers to take away from the book?

I think they need to look at three pieces of the book. One is the piece about managing information in new ways. It's imperative, particularly with CRM. In most peoples' CRM systems, there are great amounts of information, but large amounts of it are noise, bizarre things that won't help you, not signal. The second thing is that marketing and communications is a flow. It's not just one marketing or one communications action—it's all connected. And the third thing is that customers have portfolios of experiences. In other words, just because I've responded to item A doesn't mean I will respond to B. We're in an industry that desperately wants to find linear causality. If I do A, B will happen. It doesn't happen that way, and it's key to understand that.



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# WebRTC + CRM = Better Customer Support

TO GET THE MOST OUT OF WEB-BASED REAL-TIME VIDEO, VOICE, AND FILE AND SCREEN SHARING, COMPANIES MUST LINK THE FUNCTIONS TO THEIR SYSTEMS OF RECORD

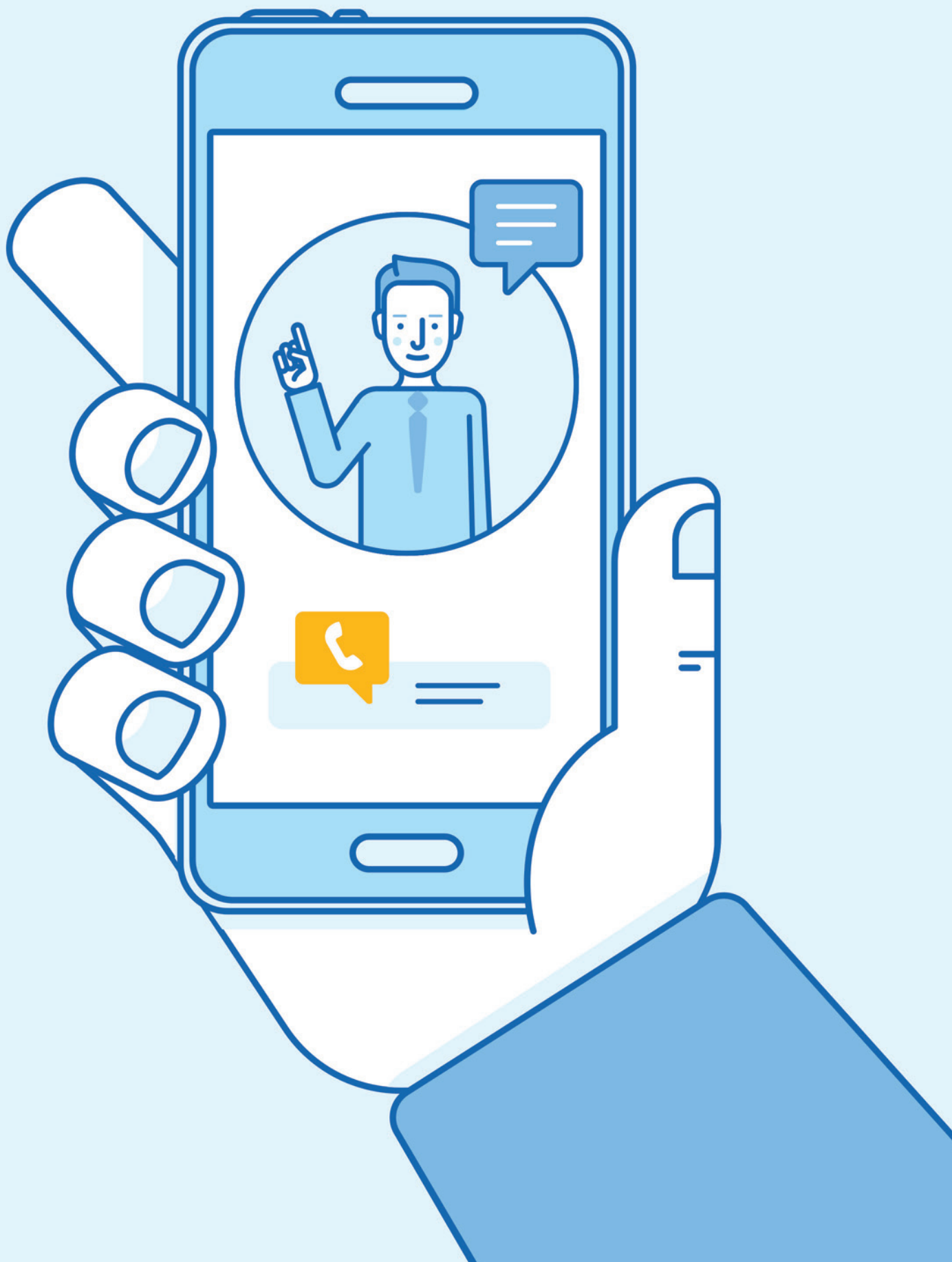
■ BY OREN SMILANSKY

**T**hough the technology has been around since at least 2011, businesses have only recently started to take advantage of web real-time communications (WebRTC).

Between 2014 and 2017, the business adoption rate for the technology has shot up from 7 percent to 34 percent, according to Omer Minkara, a vice president and principal analyst covering contact center and customer experience management at Aberdeen Group.

Technavio, another research firm, projects the global WebRTC market will grow at 34.37 percent per year between 2017 and 2021. Research and Markets puts the expected compounded annual growth rate at 36.8 percent through 2025.

WebRTC's popularity is going up because the technology promises simpler and richer customer interactions, as it leverages application programming interfaces



(APIs) that enable users to communicate computer-to-computer, via mobile or web browser, to share audio, video, and text data or operate in a co-browsing mode. Using WebRTC, people can have a video chat or phone call and look at items that the other is navigating onscreen. Most popular browsers, including Google Chrome, Apple's Safari, Microsoft Edge, and Mozilla Firefox, support WebRTC.

The technology is convenient because it requires no plugins or additional software downloads and is open-source, free, and easy to use, notes Donna Fluss, president and founder of DMG Consulting. "If I want to have conversations with people on my website, I can do it with very little," she says.

And WebRTC is only going to continue gaining strength as the World Wide Web Consortium (W3C) is developing standards for it to further facilitate interoperability.

The technology can be applied across a variety of use cases—including conference calling and collaboration among employees—but there is great potential within customer support scenarios as companies strive to minimize the friction between their customers and support agents.

For instance, WebRTC can be used to simplify the process of filing for tax returns, as customers can share their screens to show their forms to agents on the other end. "The employee would be able to see my browser, we would be able to have a voice conversation, exchange files, and the file sharing would hopefully be compliant with regulations such as [the Payment Card Industry's Data Security Standards], as it should be," Minkara says.

In fact, companies that use WebRTC are achieving 14 times greater year-over-year improvement in agent utilization rates than those that are not—meaning that they are making much better use of their agents' time, according to Minkara. Companies that adopt WebRTC can also expect four times the number of quality service agreements met. And finally, companies that use WebRTC are scoring almost two times higher in customer satisfaction ratings. "Those should be three compelling metrics for why companies should at least consider looking at WebRTC as part of their technology stack," Minkara states.

Serious organizations of all sizes will benefit from acquainting themselves with best practices and the technology landscape, as vendors of CRM and contact center solutions have been building out WebRTC functionality to facilitate a host of activities that could lead to a competitive advantage.

## CROSS-INDUSTRY APPLICATIONS

There are numerous benefits from applying WebRTC for customer support across a variety of industries, experts agree.

Brian Flynn, chief operations officer at i-Comm Connect, provider of a WebRTC call button solution, says that if used correctly, WebRTC can greatly minimize costs and increase revenue for organizations in a range of verticals, including healthcare, insurance, and retail.

Fluss agrees, noting that by offering customers the opportunity to speak to live agents without leaving their websites, companies can keep the focus on the task at hand, thus making the customer much more likely to do business with the company at a time of need. For instance, in retail, if a customer is browsing a pair of shoes on a website and decides that she wants to go beyond a text-based chat to gather additional information, she is more likely to pursue a conversation if

the screen offers an audio or video pop-up option.

And a customer who learns more about the product from the agent this way will be more likely to buy, agrees Karen Hardy, vice president of product marketing and solutions at Avaya. She says that businesses using WebRTC commonly report \$3 earned for every \$1 spent. This is largely because the customer doesn't have to find a number, dial it, and repeat his information; instead, he can simply contact an agent conveniently in the moment. Using Avaya's WebRTC technology, for

instance, "the business can have the context that can allow for the customer to fill out a form to describe what they're looking for, and the agent can immediately answer their questions." In turn, this can lead to increased sales revenue, customer loyalty, and lifetime value, Hardy says.

Minkara says that voice and video call capability should be strongly considered by organizations that need "high-touch customer interactions." Wealth management service providers, for instance, might have high-value jet-setting clients who are largely inaccessible to their bankers. "One way to provide high-touch service is through WebRTC, where clients can speak with their representatives over video," Minkara says. "You still get that face time [and] voice interaction, share files, and look at the same screen without having to travel all over the world."

In another instance, video could be used by a furniture retailer to assist a confused customer trying to assemble a bookcase. If the company has an instructional video available that can explain the process, for instance, that file could be transmitted via WebRTC. In the long run, this would be cheaper

"One way to provide  
high-touch service  
is through WebRTC,  
where clients can speak  
with their representatives  
over video."



than sending out field technicians, and it's also far more convenient for the customer.

"This means that the customer is a lot more likely to be satisfied, and it is beneficial for the business because now you're able to improve your employee utilization rate," Minkara says.

With that technology, therefore, a hypothetical furniture company has decreased costs and customer churn, as customers are less likely to abandon the business.

Hospitality companies can also benefit from real-time, high-touch communications as they try to build trust with customers while selling high-end vacation packages, Minkara points out. WebRTC could be used, for example, to show videos of properties and the amenities available there.

Other verticals that stand to gain from WebRTC include high-tech or manufacturing, where video chat can be used to

web browser, says Fluss), organizations should consider a few things before implementing it.

One is to ensure the firm has the staff and resources on hand to back up the systems. Just as a company's phone service has defined hours of operation, its WebRTC service hours must also be clearly communicated to customers.

Minkara mentions that organizations should also not overlook seemingly simple rules, such as making sure that employees are groomed and presentable for a video call. It's up to the company to determine whether it is comfortable exposing customers to the inner workings of its warehouses or would rather have the service rep sitting in a branded environment with a backdrop. Of course, a lot of this depends on the company's brand identity and image. A motorcycle company with an edgy reputation might be OK letting customers behind the

**"The ability to have a unified view  
of customer data and interaction  
history is critical."**

diagnose problems with equipment or consumer devices, says Stephen Fioretti, vice president of product management at Oracle Service Cloud.

According to Flynn, WebRTC could be more effective than traditional 1-800 call center methods for healthcare companies. Usually, he says, when the customer calls, the agent only sees the caller's direct inward dialing (DID) number. Because of this, the agent and caller have to go through several verification steps, including the account number, name, Social Security number, date of birth, etc. But with WebRTC, the technology lives natively in the environment, and so the ID information is transferred to the agent. The agent can also see which page the customer was viewing when he clicked to call, which might give additional insight into how to handle the particular scenario.

Such a platform can also identify an IP address and immediately correlate that with the customer's location information. By seeing that a call came from another country, the system can automatically route the call to an agent that speaks the language.

Meredith Schmidt-Fellner, director of marketing at i-Comm Connect, says that Auto Europe, an international car rental company, has saved 29 cents a minute using its WebRTC-enabled telephony solution.

### CONSIDERATIONS BEFORE GETTING STARTED

While plugging in and get started with WebRTC is fairly simple (all it really calls for is dropping a line of HTML5 code into a

scenes; straitlaced luxury brand buyers might have different expectations for calls.

No less important is that companies meet security requirements when handling sensitive customer information through these means, Minkara notes. This shouldn't be a deal-breaker for companies since they already have to do this with any customer-facing technology they implement.

Perhaps most important, companies need to ensure that agents have quick and easy access to information about their customers. Minkara says that for this reason, tools that integrate with CRM systems and unified agent desktops are a must.

"One of the last things you want to experience as a contact center agent or a wealth manager is not knowing the portfolio of your client," Minkara says. If the wealth management client is asking questions about recent changes to his portfolio and the agent can't view them, "that's probably one of the worst things that could happen in this case. The ability to have a unified view of customer data and interaction history is critical."

### GOING BEYOND THE BASICS

Fluss notes that basic WebRTC can't store data and therefore can't go the extra mile to perform more advanced functions that could benefit serious organizations; if a company wishes to archive chat or audio dialogues to analyze them for trends or sentiment, for example, it will need to invest in extensions.

Oracle's Fioretti suggests adding WebRTC voice and video functions to existing platforms. "By integrating all channel

offerings, including WebRTC, with a CRM system, customers gain flexibility to add new channels in the future,” he points out.

Such an integration also provides customers with the following benefits, says Fioretti:

- the ability to seamlessly escalate from one real-time channel, such as chat, to video chat or co-browsing;
- the opportunity to retain context during cross-channel journeys;
- personalization across all channels;
- the ability to maintain common analytics, such as which channels are being used most frequently and which ones are most effective in driving a resolution; and
- the option to design service experiences for different customer segments.

“This final benefit is especially important for video,” Fioretti says. “Video agents are often specialized resources, and it’s important to move the right customers into this channel. Often, companies employ video agents to address VIP customer segments, and others may offer voice or video as a special service channel to subscribers with visual or hearing impairments.”

### THE VENDOR LANDSCAPE

A number of software vendors are working on building out WebRTC functionality or compatibility. According to experts, some of the major players in this market include Avaya, Oracle, Mitel Networks, Aspect Software, Cisco Systems, CafeX, Microsoft, Genband, Google, Huawei, IBM, Polycom, and AT&T.

Fluss points to Twilio as just one company that sells additional components that utilize WebRTC.

Flynn describes i-Comm Connect’s TACTAL offering as a secure, customizable WebRTC “call us” button that companies can embed into their websites and configure for their business needs. He says that companies using such a feature can reduce the hoops customers must jump through with typical IVR phone solutions.

Instead of listening for numbers and following audio instructions, customers can navigate visual directories on their mobile devices or the web to get to their desired end point, whether that is a product specialist on the other end or someone in another department or country. The customer can place the call over the computer, granted that person has a functioning microphone and speakers. “We’ve made [the IVR] visual,” Flynn says.

### THE FUTURE OF WEBRTC

WebRTC is maturing as a technology. It is reaching the point where it is table stakes for software vendors and is being embedded deeply into their offerings.

Five9, provider of a cloud-based contact center solution, is just one vendor designing its tools with the understanding that WebRTC will be standard for both inbound and outbound customer contacts, says Gaurav Passi, the company’s executive vice president of products and technology.

According to Passi, increasingly, the software will need to be able to handle customers as they hop across devices and channels. Further, agents must also be equipped to proactively reach out to customers and anticipate complications before they happen.

Customer service is “really about matchmaking at the end of the day—making sure that when you reach out to a brand with any questions that you might have, you get the right answer from the right person on the other side, or through self-service, or even proactively,” without having to seek it, Passi says.


Passi adds that in the future customers will also have higher expectations for support within environments that they browse, including mobile apps and social media apps. “People don’t want to have to download anything” or leave their current environments to complete a task, he says.

Avaya’s Hardy agrees, noting that WebRTC is becoming standard today, as customers expect to contact companies quickly with-

out barriers and expect seamless interactions in any channel they choose. Agents, she maintains, must be equipped to prioritize high-value channels and move across them as the customer does.

As hindrances such as poor internet connectivity go away, customers’ expectations for real-time communications will only increase.

As of now, there’s still an opportunity to stand out with WebRTC, Hardy believes. “I think many contact centers are just beginning to touch the surface of feeling comfortable with putting the click-to-call and video to support WebRTC,” she says. “What we’re going to see, probably, over the next couple of years is WebRTC being supported right through, to the agent.”

And WebRTC will become an end-to-end experience. 

“People don’t want to have to download anything” or leave their current environments to complete a task.

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PULLING MAXIMUM  
BENEFIT FROM A

# Partner Ecosystem

Global companies don't become as successful as  
they are by going it alone | BY PHILLIP BRITT

A partner ecosystem is essential to building sales today. Partners have expertise that the original manufacturers often lack, and so they are a great resource for filling in the necessary gaps to expand sales.

"It's not feasible in today's world to take a direct sales approach in every market. At some point, the infrastructure to support a direct sales model—the management, the employee infrastructure, etc.—is not justifiable," says Brad Pace, vice president of customer success at inpartner, a vendor of partner relationship software. "An indirect model enables a company to capitalize and take advantage of those valuable markets that don't yet support the direct sales model.

"A partner ecosystem gives you the market leverage you need to expand your market globally in a way you can't with a direct market," Pace adds. "There is no way a company like Microsoft, for example, could create the foundation for global expansion without seeding markets with partners before you go and build a direct sales model."

Additionally, Pace says, partner ecosystems give manufacturers a predictable, controllable expense for those markets and reduce surprises, while enabling companies to maximize sales investments. This applies equally whether entering a new geography or offering a new product or service; companies can often expand better and faster through partners.

If in the future the company determines that there is enough demand in the expanded market, it can add its own employees, salespeople, and other infrastructure it directly controls.

"When you do invest in your direct model, you're not taking risks because you know where and when you're ready to enter those markets with a full infrastructure," Pace says.

## DIFFICULTIES EXIST

But many of today's partner ecosystems, at least in the business-to-business space, are falling short, according to a recent report from Accenture Strategy.

In its "B2B Customer Experience 2017" report, the consulting firm said that complex customer buying journeys and sprawling partner networks are preventing B2B companies from delivering the personalized experiences that drive loyalty and growth.

Based on a survey of 1,350 sales and customer service executives from B2B organizations around the world, the report found the following:

- While 97 percent of B2B sales and customer service execs say that channel partners are critical to their businesses, just 21 percent have total control over their organizations' sales networks and overall customer experiences.
- More than eight in 10 (84 percent) do not have visibility into sales partner opportunity pipelines.
- More than seven in 10 (71 percent) say customers increasingly want business-to-consumer-like experiences—faster response times and 24/7 availability—but nearly half (49 percent) say they're failing to deliver the personalized experiences their customers crave.
- Companies with integrated partner lead generation and coaching are 63 percent more likely to exceed their indirect channel revenue goals.







Selecting the right partners, establishing and maintaining strong lines of communications across the sales ecosystem, setting reasonable expectations, and employing technology to solve the challenges are all keys to success, according to experts.

In nearly all areas, there are several partners that are capable of handling regional, vertical, or horizontal integration; consulting; technical expertise; providing ancillary products or technologies (i.e., wireless connectivity and system integration); supplying, supporting, and connecting back-office systems, such as ordering, accounting, payments, and fulfillment; follow-up; and every-

partnerships as a numbers game. They add as many as they can. But only a handful of partners will really drive added value. When you have hundreds of partners, the value of any one is diluted. We prefer to have fewer partners and go really deep with them.”

“If you want to go fast, go alone; if you want to go far, go with a team,” says Heidi Tucker, vice president of global alliances at InsideView, a provider of market intelligence for sales and marketing departments.

Another reason that partnerships and sales ecosystems fail to produce benefits, Tucker says, is that they are “Barney” partnerships: I love you, you love me.

**“When people are not looking at the long term, that’s when partnerships break.”**

thing else necessary for a successful sales ecosystem.

When looking for the best partners, the first step is to establish goals for the sales ecosystem, then look for partners that will aid in accomplishing those goals, says Somrat Niyogi, vice president of business development at Clari, a sales execution and forecasting platform provider.

“Some companies do it for brand awareness. Others are trying to leverage someone else’s brand,” he says. “Others want to increase the pipeline and add new opportunities or to enter a new territory. Others want a strategic partnership”—i.e., combined software packages.

Whatever the reason, companies need to look at their sales partnerships as long-term strategies, according to Niyogi. “You need to look at what the end game is. Partnerships need to be win-win. You need to have mutually agreed-upon measures of success. When people are not looking at the long term, that’s when partnerships break.”

Clari uses what Niyogi refers to as a “crawl-walk-run approach.”

“We look at quality over quantity,” he states. “Some companies look at

A lot of people get into partnerships because they are people-oriented, but the hard part is to make it productive. You have to clearly understand the motivation for [all partners] and then align specific strategies and tactics for mutually beneficial outcomes. There has to be something tangible and beneficial for all partners.”

But too often, according to Tucker, one partner in an ecosystem is looking to try to sell to another partner’s customer list. The best partnerships are the ones in which everyone benefits.

Ecosystems involving companies like Microsoft, HP, and other major players have been at their most successful when even the small, lesser-known members have brought value to the table, helping to boost the sales of the better-known names while increasing the value of their own firms, according to Tucker.

### FINDING A FIT

There are many ways companies can find beneficial partners. Niyogi recommends talking with customers to learn which providers they have used. “They are people we trust—they are our customers,” he says.

“Every market is different,” says Gordon Burns, chief marketing officer at Bullhorn, a provider of CRM solutions for the staffing and recruiting industry. Bullhorn works internationally and, therefore, works with many partners, using the ones with the best expertise in each nation. “The billing and payment are different in each country. Different companies have expertise with the job boards in different countries. We want to deliver an incredible customer experience in each market we work in. We work only with those resellers committed to an incredible customer experience.”

While working with different partners can help increase sales, companies need to make sure that they work with partners that add value to their own organization, agrees Stephen Moss, president of service at PCM, a value-added reseller of technology products.

Additionally, when negotiating deals, make sure partners are included, he adds. When his firm worked on deals to provide services at M&T Bank Stadium, home of the NFL’s Baltimore Ravens, and at Wrigley Field in Chicago, it included partner providers of WiFi services, original equipment, software, and training. He added that there will often be different partners for different sales opportunities.

“Agree on service-level objectives and reporting requirements,” Moss adds.

### ADDITIONAL CONSIDERATIONS

Another critical issue for many companies is the change management necessary in moving from a model where everything is done in-house to using a partner ecosystem, says Manny Medina, CEO of Outreach, a sales engagement platform vendor.

Many sales organizations have their sales playbooks in a three-ring binder that was likely developed by someone no longer with the organization, Medina explains. While that sales playbook exists, more often than not, employees and partners no longer follow it.

“If I have more than 50 sellers, maybe only 25 percent follow the process. Some that don’t may still do well, but you can’t scale that. You need a standardized



process to create opportunities to scale the organization,” he says.

But just because companies and their partners have defined sales processes and other essential sales ecosystem elements in place doesn’t necessarily mean they will be successful in deploying them, Medina acknowledges. So Outreach uses trainers to help different partners maximize their effectiveness.

“Companies with integrated partner lead generation and coaching are 63 percent more likely to exceed their indirect channel revenue goals,” adds Jason Angelos, managing director and sales transformation global lead at Accenture Strategy. “It’s not surprising that the majority of organizations are planning significant investments in enhancing digital channels to improve ecosystem engagement over the next two years.”

Additionally, some firms already rely on digital channel management systems to maximize efficiencies. Salesforce.com offers partner management capabilities, and impartner, NetSuite, IBM, Zyme,

ecosystem, recommends John Garvens, senior consultant and technical trainer at Simplus, a Salesforce.com consulting partner.

Garvens also recommends that companies pivot from partner management to “ecosystem orchestration.”

“Companies can regain control over customer experience by considering indirect partners as extensions of their own businesses and critical enablers of customer value. Intentionally teaming with a select network of partners and ensuring they are well supported can significantly improve customer experience,” he says.

Accenture’s report also recommends using analytics, customer data management, and social listening technologies and integrating them with core customer experience capabilities to vet partners and measure their performance throughout the full duration of the relationship.

“It needs to be simple to become a partner, but it should be challenging to get on the varsity [squad],” Garvens says. “Salesforce has more than 1,000


manage their sales ecosystems with spreadsheets and little else, according to Jessica Thiele, marketing manager at VL Omni, provider of a customer order integration platform.

Make sure that all partnerships in the ecosystem are supported at the executive level, Tucker adds. Some parts of an ecosystem never rise above the junior management level where they started. Without executive buy-in, such ventures perform poorly.

Several experts agreed that for any sales ecosystem to be successful, all the parties involved need to be clear how revenue will be shared, what each partner’s responsibilities will be, and what economic and strategic benefits they’ll both receive and bring to the table.

“You need to articulate how everyone receives value so that there are no false expectations,” Tucker says. “Someone in the organization has to own the partnership.”

Another essential element in having a successful sales ecosystem is making sure that the entire sales funnel is covered from beginning to end, from prospecting right through to post-sales follow-up, Thiele says. Too often companies focus on having a visually impressive front end but don’t have the technology and data integration to provide proper invoicing, order, and payment confirmation, proper follow-through, repeat prospecting for new sales offers, and so on.

Sales ecosystems will continue to deliver new market opportunities for many companies. Those that enter these partnerships with a clear understanding of the opportunities and risks involved and take the steps to spell out all of the expectations and responsibilities will benefit the most from them. Those that add partners just for the sake of being able to brag about having an extensive partner network, without really taking the necessary steps to maximize the benefits for all involved, most certainly will not. 

**“You need to articulate how everyone receives value so that there are no false expectations.”**

PartnerPath, Relayware, Allbound, and other firms have partner management software that, according to Pace, helps companies manage partnerships much like CRM software helps them manage customers, providing visibility throughout the sales ecosystem.

But even carefully selected partners can underperform, so it’s important not only to set expectations but to monitor performance on an ongoing basis, Medina says. After that, companies can then optimize the sales ecosystem to focus on the best-performing partners. Additional training might help underperforming partners, but some will never make the grade and should be eliminated from the sales ecosystem.

Then it’s important to use technology to provide transparency throughout the

partners, but only a small percentage qualifies as platinum partners, and even fewer are global strategic partners.

Furthermore, “just because a company is a platinum partner now doesn’t mean it will still be one in the future,” Garvens adds, pointing out that Salesforce recently increased its requirements for bestowing higher-level statuses on partners. Partners in an ecosystem should not only strive to continue the performance that brought them there but should expect to have to continue to improve.

“Establish a clear system that shows where the entire ecosystem is going, not just where you are going,” Garvens adds.

While partner management technologies have existed for quite a while, there are still companies that

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# Making It Personal for Every Customer



While personalization for a small group of customers is simple, achieving personalization at scale requires a combination of strategy and technology | BY SAM DEL ROWE

**M**ore than two-thirds of companies today cite personalization as a top priority, according to a report by Forrester Research, and with good reason: When done well, personalization can enhance loyalty, increase revenue, lower costs, influence customer behavior, and evoke positive emotions in customers by engendering feelings of value, appreciation, and confidence, the research firm found.

In fact, personalization has been found to reduce acquisition costs by as much as 50 percent, lift revenues by 5 percent to 15 percent, and increase the efficiency of marketing spend by 10 percent to 30 percent, according to *The Harvard Business Review*.





Personalization, Forrester says, “uses customer data and understanding to frame, guide, extend, and enhance interactions based on that person’s history, preferences, context, and intent.” It is now something that consumers expect from companies, given how much data they share with those companies.

But while personalization for individuals and small groups of customers is simple, achieving personalization at scale is far more involved. The wider the audience, the harder it is to personalize the interaction for each individual within it.

And, especially with larger audiences, it’s neither possible nor cost-effective to tailor every single message to every single customer at every single moment on every single channel. That’s why companies need to look to increase their efforts around personalization at scale. But to do so, businesses will need to establish strategies to build out their personaliza-

tion efforts while implementing the right technologies to see those efforts through.

customers it identified as being at risk of churn based on key characteristics and their in-app behavior.

### STRATEGY COMES FIRST

Experts agree that personalization is essential and that companies need to develop a well-defined strategy from the outset. “It’s more important than ever for brands to deliver tailored, personalized experiences to their customers no matter where they choose to interact,” says Drew Burns, principal product marketing manager for Adobe Target, a personalization platform offered as part of the Adobe Marketing Cloud. “Connected, engaging customer experiences across touch points should be the ultimate goal for brands.”

“The future of marketing is to get personal,” says Wilson Raj, global director of customer intelligence at SAS Institute, a customer analytics software provider.

marketing officer at Elicit, a customer-centricity and marketing strategy consulting firm. The first and most critical of these is ensuring that all internal stakeholders are in agreement on the definition and objectives of the personalization initiative.

Different teams often have different personalization goals, so all of the possible use cases need to be documented before personalization efforts begin, Niemiec advises. Once these opportunities are defined, the next step is to determine the data necessary to support each type of personalization.

This is also the time to inventory customer information, such as contact details, channel preferences, shopping behaviors, marketing responses, interaction histories, and personal information, she says.

Finally, when companies have determined which areas to personalize and what data they need to support those efforts, they can review personalization capabilities at each customer touch point.

“A general benefit of this process is that any gaps in customer knowledge or system functionality tend to be quite obvious,” Niemiec says.

While rolling out personalization with current customer data and technology, “you can also work in parallel on a customer data capture strategy and a technology upgrade plan so your personalization gets more sophisticated and scalable over time,” she says. “So as not to get overwhelmed by the possibilities, partner with the analytics and IT teams to prioritize opportunities based on the reach, the potential benefit due to personalization, and the cost of implementing personalization at each touch point.”

Niemiec says that personalization can and should be conceptualized as a spectrum that ranges from mass to one-to-one, and that personalization matters most in highly interactive moments.

Burns proposes a similar approach, saying that marketers “need to start their personalization efforts with a good foundation.” With this in mind, he says that the first step is building a business case for personalization. Although it’s

*“Personalization efforts are only as good as the data used to craft the right customer experience.”*

tion efforts while implementing the right technologies to see those efforts through.

The Forrester report singles out Starbucks and photography community platform EyeEm as examples of companies that have been successful with this kind of personalization. The coffee giant’s app and email personalization efforts have contributed to a 21 percent increase in spending from members of its loyalty program; EyeEm improved app retention by 67.3 percent after sending personalized notifications to groups of

He notes that personalization “involves many things that create a meaningful dialogue between brands and their prospects or customers,” including relevant offers, product recommendations, in-store promotions, and e-commerce opportunities. “Every touch point along the customer journey is fair game for personalization,” he says.

To reach those levels, companies of all sizes should take a number of steps to initiate their personalization efforts, according to Brooke Niemiec, chief



no surprise to marketers that personalization is essential to a successful marketing strategy, other teams might need more convincing, especially when personalization efforts are competing with other ROI-generating initiatives, he notes.

Burns also cites data assembly as a crucial initial step, saying that “personalization efforts are only as good as the data used to craft the right customer experience,” and that unified data spanning online and offline channels is key, as it enables marketers to fully evaluate how customers are responding to their personalization efforts and quickly adjust. Once these two steps have been taken, both quantitative feedback, such as that provided by analytics, and qualitative feedback, such as that provided by focus groups, can yield “low-hanging fruit” opportunities with which to initiate the personalization effort, he says.

For Raj, data is “the fuel for personalizing the customer experience and sequencing the customer journey in an optimal way.” He notes that historically, companies have used structured customer data, such as demographic, transactional, and event data, for this purpose; but that today, semi-structured or unstructured data, such as social media, geolocation, and sensor data, can help companies develop a better understanding of customers’ journeys and which points within that journey are most significant. “All this boosts the level of personalization to the customer,” he says.

To ensure that marketing messages are relevant to larger groups of customers, it’s a good idea to logically segment customers so that messages can be tailored to all—or most—of them in that group. Start with the customer journey because different customers have different wants, needs, and expectations at different steps in that journey. Then further segment customers based on their demographics or behavioral data.

All of this data can be used to create customer personas that can then be targeted with specific messages at scale. And

# *Machine learning and data science “hold the key to creating the most personalized experiences at scale.”*

as you go along this process, you can develop as many customer segments and personas as necessary to properly tailor the right messages to the right audiences.

## **TECHNOLOGY’S ROLE**

Delivering personalized experiences at scale requires the right tools, experts emphasize. “Regardless of their personalization strategies, marketers can’t go at it blindly,” Burns says, noting that technologies for data management and campaign orchestration are critical. As these tools continue to become smarter and more advanced, they can often be integrated into a unified architecture that allows them to communicate and collaborate on a much larger scale.

Niemiec agrees. “If you think of personalization as a one-to-one interaction, completely customized and almost human in nature, the prospect of managing personalization with a growing customer base can seem daunting. In reality, customer interaction technology, from CRM tools to call centers, should do much of the heavy lifting, as long as it has been designed correctly,” she says.

She goes on to say that there are three layers of marketing technology solutions that make personalization at scale possible. The bottom layer is responsible for customer data and enables the

processes of storing, managing, and moving that data to the systems responsible for executing personalization. The middle layer is responsible for coordination and features tools that plan experiences based on integrated information, such as a campaign management tool. The top layer is responsible for execution and includes any tool that a marketer might use to deliver an experience, such as a CRM solution, website, or mobile app.

All too often, though, the data and execution layers are sufficient to scale with growing personalization efforts but the coordination layer is overlooked, which can result in poor execution and, by extension, a bad customer experience, Niemiec says. “An ad that stalks you to purchase a product you’ve already purchased is typically the result of a non-existent or non-functioning coordination layer,” she adds.

“The scale of crafting hyper-personalized experiences can quickly become insurmountable without the right tools and technology,” Burns says, adding that artificial intelligence technologies such as machine learning and data science “hold the key to creating the most personalized experiences at scale.” With these technologies, marketers “can evaluate all available traits and profile variables about their customers and deliver



them the next-best optimized experience at any digital touch point,” he says.

In fact, Burns believes that AI can make marketing more precise than ever. “By tapping into artificial intelligence and machine learning to create spot-on relevant experiences and automation at scale, brands can curate unparalleled customer journeys that far exceed what human marketers alone can deliver,” Burns says. “By leveraging artificial intelligence, marketers can also take the guesswork out of learning what does and does not resonate with consumers. This ensures that customers receive only the most relevant experiences. As such, brands can go even further with their personalization efforts without having to worry or feel like they’re taking risks or making assumptions with their valuable traffic. The result is that the best experiences will only get better.”

Niemiec outlines three things to keep in mind as companies scale their personalization efforts:

First, having more customers might mean having different customer needs. To keep an eye on this, companies should regularly run broad-based customer analytics to identify behavior changes that should be addressed by their personalization strategies.

Second, just because a company is able to personalize something doesn’t mean that it should. In other words, although personalization can be done in many ways, not all personalization efforts will have the same impact. To keep personalization focused as they scale, companies need to consider how many customers they will reach through any given interaction and how essential it is to have personalization available at each of those particular touch points.

Third, limited creative resources are one of the biggest obstacles in personalization efforts, Niemiec notes. She suggests that companies use tools such as structured email templates that can be populated by dynamic content to reduce the amount of effort that personalization at scale takes.

“You need to find the right balance

between effort to personalize and the results of that personalization. It’s essential for personalization to deliver ROI; otherwise, it will die,” says Manny Medina, cofounder and CEO of Outreach, a sales enablement platform provider. “Once you have that, you’re ready to scale your program. At this point, you need to be at peace with computers performing personalization on your behalf. Fighting this is like fighting

*“It’s essential for personalization to deliver ROI; otherwise, it will die.”*

gravity—there’s no other way to scale. Break it into steps and figure out which pieces can be automated and which pieces require a human touch.”

Tyler Lessard, vice president of marketing at Vidyard, providers of an online video platform for businesses, agrees, saying, “Personalization is a journey, not a destination. The opportunities for personalization are countless, so it’s all about prioritizing where to start and building as you go.”

### A NOTE ON B2B VS B2C

Experts maintain that although the fundamental principles of personalization do not differ between B2B and B2C companies, channels and customer expectations do. “The concepts are similar but the approaches to personalization tend to differ quite a bit,” Lessard says. “B2C companies will often focus on delivering personalized advertisements to consumers via social media channels and digital advertisements. These are often personalized based on past browsing history and social media behavior. B2B companies tend to focus on personalizing their web content and direct email marketing as their audiences are much more niche and difficult to identify at scale.”

For Medina, the main difference is determined by contract values. “B2C [companies have] much smaller contract values, so the ROI of deep one-to-one personalization just isn’t there. B2C companies have no choice but to extensively automate personalization,” he says. “For B2B companies with high contract values, manual personalization might still be ROI-positive.”

Medina does note, however, that “we will soon reach a point where automation is proven trustworthy and reliable to the masses, and at that point, B2B personalization strategies will look a lot more like B2C.”

The change, he adds, is already afoot. “We’re starting to see this [as] reps who’ve cracked the code on where and when to apply automation are driving better results, closing more business, and making more money,” he says.

Burns notes that different audience types require different strategies, something that “any successful marketing plan” should take into account. He goes on to say that for B2B and B2C companies alike, “it’s about understanding your audience—their needs, expectations, buying habits, and the content that’s right for them—and building out a personalization strategy from there.”

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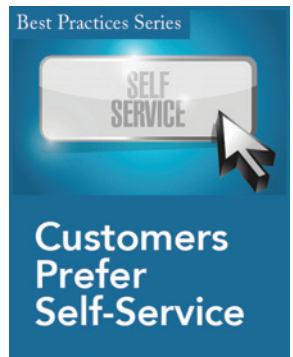
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# REAL ROI

## Scott's Cheap Flights Lands Its Messages with ActiveCampaign

*A travel deal notification service provider engages subscribers with email marketing automation and small-business CRM software*

Scott's Cheap Flights, an email service that notifies subscribers about upcoming affordable flights, began as a hobby, after founder Scott Keyes got back from a vacation in 2013. When Keyes returned to his office, his coworkers and friends caught wind of the incredible deal he'd scored: a nonstop round-trip from New York City to Milan for just \$130. They requested that he keep them in the loop for future trips, so Keyes started sending emails to a list of people he knew, hoping to share any bargains he found.

Since sign-ups were open, the list began to grow through word of mouth beyond Keyes's circle of family, friends, and acquaintances, and by late 2015, Keyes had launched a full-fledged, business, with added options for premium subscriptions that offer additional perks for diehard travelers. The digitally connected team is now composed of 25 professionals not limited to Keyes's home base in Portland, Ore., but spread out in places such as Colombia, Scotland, Moldova, and Bali, among others.

Until April 2016, the company was relying exclusively on Mailchimp to carry out the bread and butter of its business: emails. "But by the time we started to hit 100,000 or 150,000 [subscribers], it started to really have a lot of issues," Keyes says. For one thing, the system

wasn't equipped to tag that many users based on their preferences, or follow up with the offers that could lead to increased opened emails and engagement. For instance, if a subscriber was interested exclusively in flights from Los Angeles or New York, the system couldn't determine that. "That's when we went hunting for a new email carrier, and what brought us to ActiveCampaign."

According to Keyes, Scott's Cheap Flights was in a unique situation in that it didn't resemble most companies with email marketing campaigns,

which tend to send fewer emails using specific drip buckets. "When people sign up, they want an email every time there's a good deal" from their location, Keyes says. "We might be hitting someone with an email up to five times a day."

The company needed an enterprise-level solution to make sure it was getting emails out quickly enough and hitting the right inboxes, and not being delayed by server mishaps that could lead to reputational issues.

"With cheap flights, time is paramount—the best deals don't last very long," Keyes says. "Creating a system where people are getting our alerts as quickly as possible is really, really important."

When the company deployed ActiveCampaign, the transition process was

"fairly seamless," Keyes notes. The company simply imported user data stored in Mailchimp. The biggest adjustment was in learning new processes, like working with a new CMS and the nuances of the system.

Scott's Cheap Flights now uses ActiveCampaign for most of its interactions with customers. Using the solution, the company can set up internal algorithms and drip buckets, which can assist with on-boarding campaigns for an average of more than 2,000 new users a day and sending out emails. Much of this operates according to user behavior. If someone signs up for the list and doesn't open the emails they receive during the first week or two, for instance, the company can follow up asking whether the person received the communication. This can help determine whether the person is in fact a high-value customer or whether to stop sending him the emails altogether.

Since Scott's Cheap Flights started using ActiveCampaign, it has gone from close to 150,000 subscribers to 1 million. The open rate on each email the company sends falls between 25 and 30 percent. And the company sees more interest in its paid, premium services, Keyes says.

In the future, the company is planning to redesign and relaunch its properties, making sure that the foundation and back end are working smoothly, which will enable it to implement new features and technologies, including a mobile app that will include a push notification system. —Oren Smilansky



### the payoff

SINCE IMPLEMENTING ACTIVECAMPAIGN'S EMAIL MARKETING AUTOMATION AND SMALL-BUSINESS CRM SOFTWARE, SCOTT'S CHEAP FLIGHTS HAS:

- grown its subscriber list from 150,000 to 1 million;
- seen 25 to 30 percent open rates on all sent emails; and
- increased interest in its premium services.

# BoomTown Builds Valuable Voice Insights with Invoca

*The B2B real estate software company increased conversions and ROI with call intelligence*

BoomTown, a company that helps real estate professionals with CRM efforts and other marketing needs, needed a way to boost its own marketing with prospective clients, who are typically brokers or lead agents.

Clients tended to learn about BoomTown, which is based in Charleston, S.C., through word of mouth, online research, or industry publications. Boomtown relied largely on prospects filling out an online form, with someone from the BoomTown sales team then following up, according to Brock Ward, its digital marketing manager.

In late 2015 and early 2016, BoomTown evaluated its marketing practices and realized that calls from prospective clients led to conversions at a much higher rate than online inquiries and generated more revenue.

Calls are important for another reason: Real estate professionals are frequently in the field visiting properties and meeting with clients, and the unpredictability of their schedules make them more likely to call for information than to fill out a web form or send an email.

BoomTown execs decided they needed a platform that could extract information from prospects' calls and put it back into the company's own marketing efforts.

"In my role as digital marketing manager, I was looking for a way to stitch

together our offline and online marketing efforts," Ward says.

The firm eventually chose Invoca's Voice Marketing Cloud, which connects insights from voice conversations to the rest of the customer journey by

bringing a full suite of marketing automation capabilities to phone calls. With call and voice analytics, users can learn who's calling and why, in real time, and then analyze what's said.

At the heart of the Voice Marketing Cloud is the Signal intelligence engine that can define, discover, and act on the insights it uncovers. Signal taps into hundreds of data points and uses machine

learning to help users understand where calls originate, who's calling, the outcome of those calls, and other insights into the customer journey.

Invoca "checked all of the boxes in terms of providing the business intelligence that BoomTown could use to continue to improve its marketing efforts," Ward says.

Another plus was Invoca's native Salesforce.com integration, which automatically creates a lead profile in Salesforce once a call comes in.

The Invoca Voice Marketing Cloud natively connects with all major digital marketing clouds, and BoomTown is able to use insights discovered during phone calls to create custom audiences for retargeting or expanding reach in any channel.



*"We expanded our use of Invoca's call intelligence to gain actionable insight into our business."*

BoomTown had been receiving roughly 1,500 calls a month, and the integrations save reps roughly two minutes per call, freeing up reps to follow up with prospects and generate more business.

BoomTown has also added Invoca for Facebook, which enables the company to attribute phone calls to Facebook ads and gain other valuable insights to drive higher-quality leads. Invoca for Facebook is designed to integrate call intelligence with social media ads for smarter campaign optimization and more engaging journeys.

"The ability to connect our offline and online sales channels so seamlessly has been a game-changer," Ward says. "Even though calls dominate our sales pipeline, we rely on Facebook advertising to build our brand presence and to educate our audience through video, with the goal of getting them on the phone. We saw a large increase in total call volume when we shifted our strategy to urge prospects to call first, rather than to complete a form."

In a single quarter after adopting Invoca for Facebook, BoomTown gained a 63 percent lift in call volume and a 35 percent increase in sales from call-generated leads.

BoomTown's advertising has become much more effective since Invoca Voice Marketing Cloud and Invoca for Facebook were deployed. Total call volume has increased 63 percent; call-generated leads have jumped 345 percent. That's translated to a 20 percent increase in revenue, and to lowered expenses, with the cost per acquisition declining 82 percent.

Ward expects even more benefits with the Invoca platform. "We are just starting to scratch the surface," he says.

—Phillip Britt

## the payoff

SINCE IMPLEMENTING INVOKA VOICE MARKETING CLOUD AND INVOKA FOR FACEBOOK, BOOMTOWN HAS SEEN THE FOLLOWING RESULTS:

- an 82 percent drop in calls per acquisition;
- a 63 percent lift in total call volume;
- a 345 percent increase in call-generated leads;
- a 35 percent increase in sales from call-generated leads; and
- a 20 percent increase in revenue.



# Uberflip Makes Revinate's Marketing Content More Hospitable

*The provider of hotel operations, marketing, and revenue software turned to Uberflip to improve engagement with its premium content*

Revinate, a provider of hotel operations, marketing, and revenue software, recently found itself facing two problems with its marketing efforts. The San Francisco-based company was producing premium content that was untrackable, and its blog, while attracting eyeballs, was too cut off from its sales efforts.

"Our blog and resources library were split into two separate silos. While the blog was generating SEO traffic, the disconnect from our resources library meant we weren't transforming that traffic into leads," says Carrie Murphy, content marketing manager at Revinate. "We also struggled with having very little insight into how our content was performing. We were putting a ton of time and effort into

creating content, but most of our premium content was downloadable PDFs. We couldn't track how visitors engaged with the content after downloading it.

"The end result was an experience that wasn't buyer-centric, generated little organic traffic to our lead generation engine, and didn't provide the content engagement we needed to lead prospects down the funnel."

At an industry conference, Murphy and her manager encountered content marketing platform provider Uberflip,

and they found that it was effectively solving a lot of problems they were having at the time. "We both thought, 'We need this,'" she says. "We loved Uberflip because it gave us everything we needed in a true out-of-the-box solution. It let us combine all of our content into

**"[Uberflip] let us combine all of our content into a single lead generation engine and gave us analytical tools to see what was working and make improvements."**

a single lead generation engine and gave us analytical tools to see what was working and make improvements."

Since adopting Uberflip's platform, Revinate has seen the amount of time visitors spend checking out its premium content—which includes eBooks, guides, and case studies—more than double. "These were previously black holes since they could only be downloaded," Murphy notes. "Now with Uberflip, we've been able to measure visitor engagement and make improvements that have driven average time per page from 18 seconds to 45 seconds."

Revinate often gates this premium content, and it does so by using Uberflip's Form CTAs, which collect contact information from visitors for additional targeting. Between June and August of this year, Revinate has seen its gated content convert at an average rate of 17 percent, resulting in 474 total conversions, in which a conversion refers to a visitor completing a Form CTA to access gated premium content. "Before Uberflip, this would be comparable to visitors completing a landing page to download one of our assets. Now with Uberflip, there is a lot less friction in this process. We no longer have to create landing pages, and it's easier for our prospects to convert and access content instantly," Murphy says.

Murphy has other praises for Uberflip. "The customer success team at Uberflip is fantastic and quick to get my questions answered," she says. "They also walk me through new features on a regular basis. We have regular calls where they walk me through my metrics and give suggestions for where we can improve, which is really helpful." —Sam Del Rowe

## the payoff

SINCE IMPLEMENTING UBERFLIP'S CONTENT MARKETING PLATFORM, REVINATE HAS SEEN THE FOLLOWING RESULTS:

- the time visitors spend on page for its premium content increase from 18 to 45 seconds; and
- its gated content convert at an average rate of 17 percent, resulting in 474 total conversions from June 2017 to August 2017.

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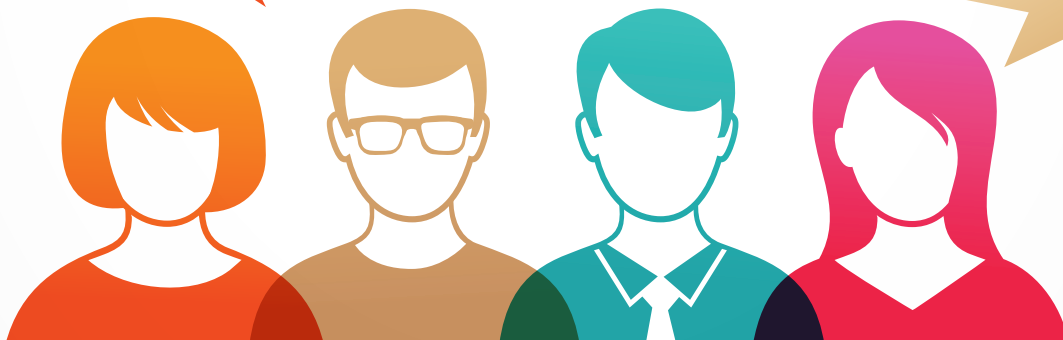
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#SpeechTEK

# Retailers Need to Adapt to the Smart Customer

*Smartphone-wielding customers are reshaping the shopping experience, both online and in-store*

**D**IGITAL ADVANCES combined with changes in consumer preferences have helped to transform retail operations more in the past 10 years than in the previous 20. Since the beginnings of online commerce, its share of overall retail sales has steadily grown; it's gone from 3.5 percent in 2008 to 8.9 percent today, according to U.S. Census estimates. Deloitte's recent 2017 retail holiday forecast anticipates that e-commerce sales will reach \$111 billion to \$114 billion—about 11 percent of total holiday retail sales.

So should traditional brick-and-mortar retailers be worried?

What makes many retailers anxious is not the market share of online channels but the influence digital channels wield over consumer shopping decisions. Digital influenced 56 cents of every dollar spent by U.S. shoppers in stores in 2016. The influence of digital media and devices is expected to remain strong during the upcoming holiday season, as more than 90 percent of shoppers are planning to use at least one digital device, whether a desktop, laptop, smartphone, or tablet.

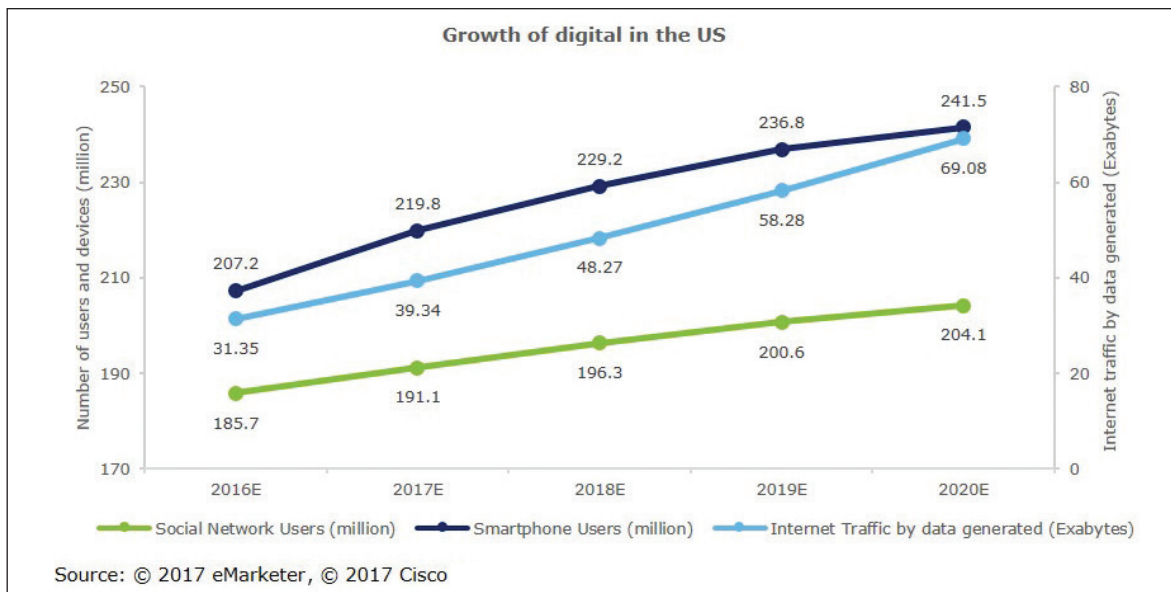
Decoding the nature of digital influence on consumers requires retailers to understand an extended digital

ecosystem consisting of digital content (e.g., reviews, news articles, pictures), digital media (e.g., retailer websites, social media, blogs), and devices (especially smartphones). Many retailers are investing in online channels and putting out rich digital content on social media to woo customers. Understanding how consumers use their smartphones and the potential these devices offer to enrich customer experiences, whether in stores or online, may be the next logical step in securing additional wallet share.

## SMARTPHONES ARE MAKING YOUR CUSTOMERS SMARTER

Smartphones have become an integral part of the customer journey, as they cater to an innate need to access information and make better purchasing decisions with minimal effort. Our primary research found that 40 percent of holiday shoppers plan to use smartphones during their shopping journeys.

Moreover, Deloitte's 2017 Holiday Survey: Retail in Transition revealed that retailers stand a 75 percent chance of converting a desktop or laptop shopper into a purchaser this holiday season—and a 59 percent probability of converting a smartphone shopper into a customer.





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Effortless access to information is often critical for shoppers when it comes to finalizing their decision to purchase. In the past, shoppers were largely influenced by an inner circle of family and friends; retailer-sponsored content, such as advertising, store promotions/coupons, and catalogs; and store associates' guidance.

In providing digital access to shopper reviews across numerous sites, whether on blogs, third-party distributor sites, or retailer websites, smartphones can make these resources accessible and available on-demand, 24/7. More than 50 percent of smartphone users rely on their devices for shopping decisions such as what to shop for and where to shop.

### EFFORTLESS EXPERIENCES

Many consumers want to make their shopping decisions based on carefully researched information—without investing a lot of additional time and effort and without sacrificing convenience. Additionally, scores of consumers demand effortless shopping experiences across channels and have become increasingly intolerant of perceived inefficiencies. Our research found that more than 40 percent of customers are discouraged from shopping at physical stores due to crowds and long lines, especially during busy seasons.


Many consumers are using smartphones to reduce their effort while making purchases in stores or online. During the upcoming holiday season, more than 40 percent of savvy shoppers will likely cut through busy checkout lines while in stores by choosing the buy-online-and-pick-up-in-store option and using payment apps—essentially taking advantage of the best of both worlds. Bottom line: Three in five smartphone users will order products using

their mobile devices, and seven in 10 users will make payments using their mobile devices.

Fueled by the widespread consumer adoption of smartphones, the use of digital content is on the rise. Retailers may well wish to evaluate their digital strategies in light of their potential to attract shoppers. Smartphone-centric strategies could conceivably benefit retailers with the foresight to expand their digital presence across channels and platforms. Actions to ponder include these:

- Think beyond a basic digital presence such as setting up a mobile app and operating a retailer website.
- Weigh the potential benefits of new device interfaces for digital content (e.g. augmented and virtual reality platforms and/or voice assistant apps).
- Examine the value of engaging digital partners for content curation and ecosystem security.

The resulting new normal for digital retail may possibly rest on a smartphone-based ecosystem encompassing retailers' in-house and third-party mobile apps, along with curated digital content.

The picture that appears to be emerging is one of rising consumer expectations for a seamless, effortless customer experience. And once again, this expectation is anticipated to affect both online and in-store channel preferences for where consumers do their research, browse for ideas, and ultimately make their purchases. Retailers that understand what makes for a satisfying shopping experience—and that can provide that experience across channels to an increasingly fragmented consumer base—may be best poised to set themselves apart from the competition. 

*Arun Tom and Ram Sangadi are retail, wholesale, and distribution researchers, and Leslie Ament is retail, wholesale, and distribution research leader, for the Deloitte Center for Industry Insights.*



MARSHALL LAGER  
DECEMBER'S CHIEF SALES OFFICER

# Pint of View

## The Hard(ly) Sell

*In-person cold calls can get way out of line*

*[Editor's note: This column originally appeared in our January 2016 issue.]*

AH, THE SALES PITCH. Few topics in business have been the subject of so much thought and effort. Salespeople will say theirs is so personal it could be used as a fingerprint. The sales pitch is a means of corporate success and personal enrichment, and one of the primary ways by which customers experience the vendors who serve them.

The pitch is also one of the things that can go the most wrong in a business context. The results can be hilarious or infuriating. Throughout history, salespeople have tried countless gambits to get a chance to make their pitch. There's a terrific Monty Python sketch called "Burglar/Encyclopaedia Salesman" that does a better job of making the topic funny than I'm likely to, so you might as well try to find it on YouTube. There's at least one Daffy Duck cartoon where Daffy goes through every door-to-door sales trick in the book, all to no avail. Clearly, there's something to this idea.

The image of the sales pitch includes "getting one's foot in the door," so to speak; here are a couple of times when it was more about setting off on the wrong foot.

Just the other day, I was sitting in a doctor's waiting room when two well-dressed young men walked up to the receptionist and asked to speak to the doctor regarding the delivery of a fish tank and its contents. This doctor does indeed have a fish tank in his office, so it seemed plausible enough to the receptionist (and to me, too). She went to his office (where he was in with another patient) to get him. The lives of several Piscine-Americans were on the line.


Out came the doctor, looking perplexed—since he already had a fish tank—and asked what this was about. The guys started with their line about delivering "his new fish tank, and the sharks and piranhas," then revealed their agenda: They were from Verizon and wanted to talk to the doctor about landing a better deal on his service package. Really.

This doctor is not a proctologist, but he managed a fair impression of one as he tore into these idiots. They had lied to get a moment of his time, interrupting his practice, all for something he wasn't particularly interested in to begin with. Getting your foot in the door might be step one, but step two is to not make your prospect hostile.

Lest you think this is just me saying bad things about Veri-

zon, my turn in the office came next. During the appointment, the doctor told me about an experience he had once with Cablevision. He and his family were painting the whole house. Everything was covered in drop cloths, and he was outside, roller in hand, working on a wall. The cable guy walks up and asks if he's busy—and would he like to upgrade his service? It's hard to imagine the combination of blindness, anosmia (paint has a distinctive smell), and plain ignorance and stupidity that would allow that question to be asked. Surprise; no upgrade was sold that day.

The doctor and I continued discussing impositions like those, because my health isn't nearly as important a topic as you might think. As an aside, he noted that in his native Haiti, there are a lot of people of evangelical faith, himself included. A person showing up at your door to discuss religion is not an uncommon occurrence. But if he shows up when a family is sitting down to a meal, he can expect to be chased off with a baseball bat.

In the end, these walk-up sales pitches are the live equivalent of cold calls, and they are just as likely to fail. Whether it's a question of tone, timing, or common sense, one thing is clear: If you're going to rely on them, you must pick your battles. If you don't, you just might be starting a battle of another sort, and you won't win. 



*Marshall Lager is a senior analyst in Ovum's Customer Engagement practice. Make him a sales pitch at [marshall.lager@ovum.com](mailto:marshall.lager@ovum.com) or [www.twitter.com/lager](https://www.twitter.com/lager).*

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