

CRM

CUSTOMER RELATIONSHIP MANAGEMENT

> Tapping Into Social's
Sphere of Influence

> Include Sales in
Customer Intelligence

> Businesses Need to
Know GDPR

THE CONTACT CENTER IN 2018:

HELPING CUSTOMERS



HELP THEMSELVES

This year, customers are demanding that service organizations build out self-service, automate where possible, and empower agents

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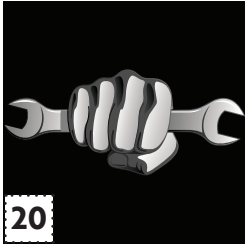
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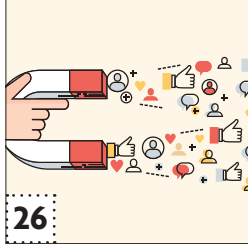
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The Influence of So-Called Influencers Can't Be Denied

Just when I thought I was starting to fit into my role as editor of *CRM* magazine—becoming someone with some level of influence in the industry—my ego was put in check and I was hit hard with the stark reality that I have very little influence at all.

At least that is what I can deduce from this month's feature "Tapping into Social's Sphere of Influence" (page 26), by Assistant Editor Sam Del Rowe. The article cites a recent report from Forrester Research that identifies influencers as "mainstream journalists, industry analysts, subject matter experts, independent bloggers, and certain social media celebrities who have influence in a specific topic or category." I suppose I could make the case that I meet at least one of those criteria, but it's

probably a stretch. After all, *CRM* isn't exactly part of the "mainstream" media. And anyway, I might be better off distancing myself from that crowd given the public's distrust of the mainstream media right now.

Then came the numbers: "A common criterion for influencers is to have at least 10,000 followers on at least one social platform and to consistently generate a minimum of 1,000 engagements (likes, comments, reposts, shares, etc.) for each piece of content," says Felix LaHaye, cofounder of influencer marketing company Open Influence, in the article. Who am I to argue? I don't have anywhere near those kinds of numbers in my fan base. As much as it pains me to say, Kim Kardashian has far more social clout than me. Maybe she can get Mr. LaHaye to expand his definition.

In the meantime, I'll be content to sit quietly on the sidelines with the other non-influencers while members of the Jenner/Kardashian clan convince their drones of followers which fashion designers to wear, which soft drinks to consume, and which night clubs to frequent.

All kidding—and my own sense of vanity (or lack thereof)—aside, influencer marketing is a very real and valuable strategy for companies to adopt, if they haven't already done so. With the cost of

acquiring new customers rising all the time, smart marketers and advertisers are realizing that having their products touted by internet celebrities with established followings on platforms that people are already using works much better than banner ads on generic websites that are either filtered out by ad blockers or generally ignored. Considering that word of mouth is still the best way to gain new business, influencer marketing makes a lot of sense—and cents. Some companies that have already turned to influencer marketing have reported five times to 10 times the returns on their investments.

The windfall can be great, but influencer marketing is not an easy undertaking. It takes a lot of work and a special skill set to find and enlist the right influencers, negotiate terms, manage them and the content they produce, track the results, and tie them to marketing goals. In the age of ad fraud, the vetting process is vitally important to avoid paying to reach fake followers or paying for fake page views.

Managing costs is just as difficult. Depending on the industry, some influencers don't need to be paid; being able to say that they were the first to try out the hottest new gadget might be enough. Others will want financial compensation, the rates for which can vary widely depending on the individual influencer, the number and demographic breakdown of his followers, the number of page views, the level of engagement generated, the platforms used, the type of content created, and lots of other variables. A single campaign can easily cost thousands of dollars.

That might seem like a lot of money, but consider this: Brands typically need to create content and then figure out how to target the right people. Influencer marketing removes that challenge because the content is produced and uniquely targeted to a captive audience that is more than willing to listen to and act on whatever the influencer says. And that's true even if the influencer's last name isn't Jenner or Kardashian.

LEONARD KLIE
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lklie@infotoday.com

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Mapping the Customer Journey from Effort to Emotion

The digital customer experience is critical to customer engagement and satisfaction, but enterprises are only now starting to map the contours of customer experience and how it will impact global business in the near future.

RAVI PUROHIT, VICE PRESIDENT AND GLOBAL HEAD, ORACLE SERVICE LINE, WIPRO

Going Global, Part 2: Staffing Up Your New European Sales Office

Any well-run company knows that its people are the most critical factor to success—and this is especially true when opening offices abroad. Here are tips for hiring staff for your new European sales office. Part two of a two-part series.

DEIRDRE MORAN, VICE PRESIDENT OF EMERGING TECHNOLOGIES, IDA IRELAND

3 Customer-Centric Hurdles Marketers Need to Clear

Long an elusive goal, the concept of one-to-one marketing is becoming both more attainable and more critical to a business's long-term success. To get there, here are three obstacles to overcome.

AUGIE MACCURREN, CEO, CUSTOMER PORTFOLIOS

5 Account-Based Marketing Techniques to Help You Engage Audiences at Scale

B2B marketers can stop wasting time and money while maximizing conversions using these ABM tactics.

ALEXANDER KESLER, FOUNDER AND PRESIDENT, INFUSEMEDIA

5 Steps to Becoming a Data-Driven Decision Maker

To enable better strategic decisions, marketing executives have to drive a data-centric mentality throughout their organizations. Here's how.

KEVIN JOYCE, CHIEF MARKETING OFFICER AND VICE PRESIDENT OF STRATEGY SERVICES, THE PEDOWITZ GROUP

How Businesses Can Benefit From AI Right Now

Artificial intelligence can seem like science fiction, but the technology has plenty of good—and current—use cases in marketing, sales, and service.

KATHERINE KOSTEREVA, CEO AND MANAGING PARTNER, BPM ONLINE

Active Data Quality: Keeping Up with Customers Is Not a Static Process

Real-time data quality operations in your CRM system provide a clearer view of customers for all stakeholders.

GREG BROWN, VICE PRESIDENT, MELISSA



Your Customer Data Is Limitless, and So Is Its Value

Your company can either navigate the digital deluge, or be swamped by it

HAVING A sturdy data foundation now is critical to successful customer engagement in the future. Properly collected and analyzed, customer data can deliver increased business revenue, bigger wallet share, and happier and more loyal customers willing to advocate for your company's brand(s).

The amount of data available to help you understand your customers and their interactions with you is massive, and it will continue to grow exponentially. Today, more than 11 billion connected devices are producing eight zettabytes of data per year. By 2025, forecasts call for 80 billion devices and a staggering 180 zettabytes of data, respectively. Companies will need to learn how to harness this "digital firehose" to their advantage. The alternative: getting inundated. No wonder 77 percent of businesses say that digital transformation is their highest strategic priority.

In the digital era, your job is to capture, retain, and grow customers amid the digital deluge. How? Let's look at my Engaged Customer Strategy framework (see diagram). Begin by gathering transactional data (e.g., from enterprise resource planning (ERP), point-of-sale, or loyalty systems), CRM system data, and any available data from third-party sources. This offline data can be enhanced with identity resolution tools that bring in online customer data as well, allowing your company to

create a best-in-class, holistic customer profile. These profiles are the foundational building blocks for transforming customer data into value.

Once your holistic customer profiles are in place, your next step is to perform data analysis on these profiles to develop customer segmentation, customer personas, customer journey maps, and more. Your goal is to identify the right customers and their preferred buying channels. While there will always be challenges performing good data analysis, there is also no shortage of analytical approaches. Many of ISM's clients choose from an array of tools—including look-alike modeling, opportunity sizing, acquisition modeling, lead scoring, cross-selling, next best offer, retention/survival modeling, response modeling, customer lifetime value (CLV) analysis, and others—to derive meaningful insights from their customer data and then transform this data into value.

CHOOSING CHANNELS

When your data analysis is complete, you are now ready to sell products through one or more of four customer engagement channels:

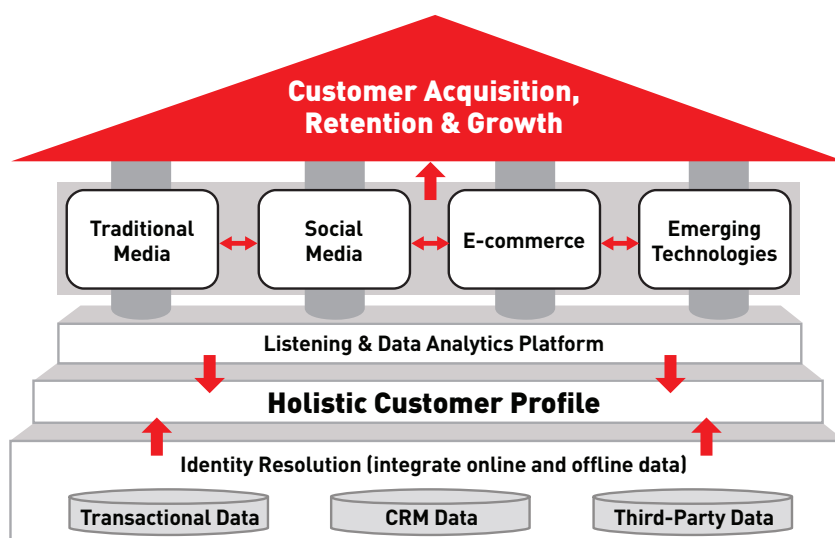
- **Traditional media.** This includes face-to-face meetings, sales calls, emails, calls to the contact center, and marketing mailers.

- **Social media.** This includes public social media communities (e.g., Facebook and Twitter), as well as private, branded social media communities.

- **E-commerce.** This consists of websites, portals, next best offer, and shopping carts.

- **Emerging technologies.** Among the rich variety of tools included here are mobile apps, wearables, personalized video, addressable TV, virtual assistants, and virtual/augmented reality.

As you select the most appropriate channels to reach your target audience, remember that different demographic groups prefer different channels. For example, Millennials and Generation Xers tend to favor




internet/chat and social media, whereas Baby Boomers prefer email or even the traditional phone channel. Your product messaging also needs to be contextually relevant to each channel since this greatly increases your likelihood of being heard. Lastly, you will need to be present across multiple channels, both offline and online, at all times. Today's customers expect a consistent level of care and service as they move between channels throughout the buying journey. In the digital world, it is all about "find me, know me, delight me."

Once you have settled on the channels best suited for selling your products, listen to customer feedback about your products coming from each channel. Then integrate this feedback into each person's holistic customer profile and conduct additional data analytics across all customer profiles to come up with more effective marketing and sales programs: better face-to-face interactions, more relevant social media community forums, a more compelling website, a more useful mobile app, and so on. Properly done, this closed-loop sales and listening process will deliver to your company enhanced customer acquisition, retention, and growth.

For all this to work, however, you need to ensure tight collaboration between marketing/sales and your technical

staff. Why? Because you need "creative" marketers/salespeople to elicit real-time online and offline data from brand-loyal customers sensitive to privacy issues and "technical" marketers/salespeople to analyze the data and help achieve smarter decision making. Individuals capable of switching between left brain and right brain and and do both creative marketing and technical marketing are hard to find.

The overwhelming volume and frequency of customer data in the digital age provides a wonderful opportunity for companies to understand their customers and prospects in a hyper-focused way. This, in turn, presents opportunities to transform customer data into increased business revenue, bigger wallet share, and happier, more loyal customers, ones who are willing to advocate for your company's brand(s). But it also poses a risk of getting swept away in a 180-zettabyte flood if you and your company do not get on top of this now. 

Barton Goldenberg (bgoldenberg@ismguide.com) is president of ISM (www.ismguide.com). Since 1985, ISM has established itself as a strategic adviser to organizations planning or implementing engaged-customer strategies that leverage technologies including CRM, social media, e-commerce, emerging technologies, analytics, and identity resolution. He is a frequent keynote speaker (www.bartongoldenberg.com) and is the author of four books, including The Definitive Guide to Social CRM. He is currently completing his new book, titled Engaged Customer Strategy: Your Roadmap to Success in 2030.

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.

Inside Content Marketing is more than a how-to guide—it's an engaging, perceptive, and must-read business title for anyone who wants to make it in content marketing and thrive in the Age of Brand Journalism.

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To Hit Sales Targets, B2Bs Need to Define Roles—and How They're Compensated

All contributions to a sale aren't equal, and neither should be the rewards

TO ENSURE customer-focused cooperation and urgency among team members, all roles in the B2B sales process should have some compensation tied to revenue targets. But in sales roles, all too often compensation is not commensurate with contribution. Sales compensation focuses on results, but the behavior and activities that drive a result might not always be properly rewarded. Some roles might be undercompensated, others vastly overcompensated. This imbalance can cause resentment on the team, leading to the potential loss of top sales resources. Below are two ways to design sales roles and how they are compensated to ensure fairness and drive progress toward your corporate sales goals:



1. For compensation purposes, define whether a sales role is central or supportive. A successful sale is facilitated by many different roles: Account manager, inside sales representative, sales manager, solution architect, product subject matter expert (SME), support technician, and customer administrator are but a handful of the diverse resources that can assist in securing a customer's business. Each plays a vital part, but they vary in their ability to control whether a company buys your product.

It's important to look closely at a typical sales cycle for your company and determine the key milestones and each role's level of impact on those milestones to determine how to compensate for a sale. For instance, in some

companies, a product SME is vital to creating interest and developing and implementing the solution, and he becomes a key part of the team the customer is buying along with the product. In this case, he should be compensated highly for the sale, as he is critical to its success. In other companies, SMEs merely provide expertise to develop interest in a product but are not part of the continuing sales cycle. In this case, that role provides a support function and should receive minimal compensation per sale.

2. Vary the leveraged portion of on-target earnings (OTE) and multipliers based on the type of sale. Most sales and sales support roles are compensated with a base salary and commissions and receive their OTEs when they reach 100 percent of their target. The OTE mix varies by industry and sales rep type.


Generally speaking, the greater the amount of leverage or pay at risk, the greater the OTE, to reflect the reduced financial security. Organizations have a powerful tool to drive behavior based on how they split a rep's OTE among these two components.

New account reps, or "hunters," are focused on contracting business with companies that are not currently customers. This type of sale normally requires more time and energy to establish trust with the customer and demonstrate the value of your product. Compensation for this sale type should be less leveraged (70/30 to 80/20) to give the rep more security while prospecting. Additional bonuses with thresholds for number of new accounts and new accounts with a minimum value are also beneficial to motivate effective behaviors.

Customer account reps, or "farmers," are tasked with maintaining and growing business in an account. They're often given annuity compensation. That sends the wrong message. This rep is responsible for keeping business, which often requires minimal effort and should be a delivery responsibility. I recommend reducing the leverage on this role to 90/10 or less to compensate for the existing relationships and incumbency.

Territory reps have a combination of customers and prospects. This is probably the most difficult role as it requires the broadest skill set. This rep has to balance time-consuming new-account pursuits and existing account maintenance activities. This compensation plan should be highly leveraged (50/50 to 60/40), with the high OTE to compensate for the expertise necessary to be successful in this dual role. This compensation plan should also include significant multipliers for overachievement, to motivate successful reps to drive more business.

And I'll leave you with some additional recommendations:

- Pay more for new accounts, accounts in a targeted industry, selling specific product lines vital to the corporation, or other areas of importance for the corporation.
- Provide a bonus to a colleague who uses existing relationships to secure another rep's business on an account. 

Paul Harney (paulharney@bellsouth.net) is an independent sales process consultant who uses his Fortune 200 sales experience to help companies close the disconnects between sales infrastructure, the opportunity pursuit process, and customer value creation.

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2018 MEGATRENDS: CRM Predictions From Top Industry Experts

As we launch into 2018, CRM industry experts predict that automation, with a healthy dose of artificial intelligence, will be the dominant trend this year. Companies will find themselves under increased pressure to automate repetitive and routine tasks to free up customer-facing employees to concentrate on more strategic and more complicated customer issues. Automating repetitive processes certainly isn't a new concept, but the addition of advanced technologies, including artificial intelligence and machine learning, promises to add a whole new dimension to sales, marketing, and customer service, and not just in 2018 but for many years to come.

Bob Fernekees

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THE PRESENT AND
FUTURE OF SALES WITH
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DISRUPTING FORECAST
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PIPELINE REVIEWS:
6 Data-Driven Best Practices

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Phone & Voicemail Automation With A Single Click

CLICK-A-HOLICS

Ten years ago it's likely you and everyone you know became addicted to on-demand communication. Whether it was email, texting, or social media, we rushed to adopt these tools so our messages could be delivered and heard — *faster than ever before*. As a result of this modern phenomenon, getting in touch with a friend or family member is now as easy as clicking a button.

Because it's the most popular way of contacting someone now, many would agree we've become social click-a-holics. However, peeling back that layer of truth reveals another: people love clicking to communicate because it makes initiating, building, and maintaining our relationships feel like less work, and thus easier to manage. It's also proof that something as simple as clicking can empower us to do great things — including for your business.

CLICK TO CALL WITH YOUR CRM

While CRMs are great for tracking sales opportunities and keeping client information, they do very little by themselves to help companies foster strong relationships with their customers. In the world of business, forming a tight bond with clients normally requires an organized series of phone calls made by an inside sales or customer support team.

In order to simplify and literally speed through this daily campaign cycle of phone calls, you must totally revolutionize the way your business communicates with clients. This can be accomplished by simply using a product called **Cricket Click Dialer**. With Cricket, all your CRM phone numbers are automatically turned into “clickable” links so that just one mouse click instantly places a call for you. No

more wasting time looking back and forth while keying numbers in your phone! Cricket also works on websites, emails, and spreadsheets. There's no complex integration needed if using either Chrome or Firefox browser.

VOICEMAIL DROP AUTOMATION

Clicking to call clients will make you more productive, but it doesn't guarantee someone will answer the phone to speak with you. When this is the case, you're instead often invited by their greeting to leave a message on their voicemail or answering machine.

Most people still listen and respond to their voicemail messages — if you take time to leave them one! And you should. Voicemail messages create a *digital trail of breadcrumbs* that can lead someone back to you or your company's website. If they do reach out to you, this could put them back into your marketing funnel, exactly where they belong. Thus, *you should always* leave a voicemail whenever given the chance. It could be the beginning of a future *real* conversation or even better, a valuable business-client relationship.

Staying productive requires most sales reps to skip this task since they have a long list of people to call with few seconds to spare. In addition, leaving the same message over and over can be exhausting and tedious. Due to these time constraints and limitations, it's imperative for sales teams to spend their effort talking with only people — *not* answering machines. Hence, *the need* for voicemail drop automation.

Voicemail drops enable you to create and send *pre-recorded messages* to answering machines. It's the perfect way to *avoid talking*, yet still have your message heard.

HOW PERSONALIZED VOICEMAIL DROPS WORK

Cricket Click Dialer gives you the autonomy and flexibility you actually need when crossing paths with answering machines.

For the same reason businesses use personalized *email templates*, you can personalize voicemail drops so the pre-recorded messages sound authentic and unrehearsed *every single time*. To do this with Cricket Click Dialer, you simply wait for the *beep*, greet the person by name, then click to send the rest of the message which you pre-recorded. For example: You say “*Hello, John*” then click message 2 which says “*This is Sam Anderson with ABC Company. I'm sorry I missed you but I wanted you to know about our new product...*”. The call instantly disconnects when you click your pre-recorded message, thus allowing you to move onto another call while your message continues to play.

Remember that addressing someone by name in a voicemail is really important for a few key reasons:

1. Personalization gets your message heard by the intended receiver.

Getting in touch with the right person is a cinch if doing B2C sales because you're calling people's personal phone numbers. However, this can be a *huge* challenge when calling B2B because you may be forced through an automated IVR system to connect with the decision maker you aimed to speak with.

If your voicemail message is *specifically addressed* to someone in the company, more often than not, the *wrong person* will relay your message to the *right person* or at least notify them that you called as



opposed to a generic sales pitch that will likely be deleted.

2. Personalization compels people to listen to your entire message.

People greet each other all the time. It's how relationships start which just so happens to be your main mission. If you're doing some good old fashioned cold calling or reaching out to aged leads, addressing a person by name gives your message a louder, more important voice for them to listen to.

Overall, calling a person by name makes their ears perk up and creates more interest in listening to the rest of your voicemail message.

3. Personalization shows you care.

Greeting people by name is considered to be direct, courteous, friendly, and it shows you cared enough to do a little research about the person or business you called. It shows them you're genuinely serious about connecting with them and not just blasting out calls with no thought or research.

So, should you send *personalized* pre-recorded messages? In most cases, yes. Conveniently, Cricket Click Dialer gives you the power to pick and choose when you do.

GETTING CLEVER WITH VOICEMAIL DROPS

Cricket enables you to create, save, and deploy any 1 of 5 pre-recorded messages in your voice on a prospect's answering machine. With multiple different pre-recorded messages at your disposal, *getting clever* and using all the messages to your advantage is ideal based on the type of campaigns, locations, time of day, follow up stage, and type of people you are calling.

THE 4 BEST REASONS TO CLICK DIAL & AUTOMATE VOICEMAIL MESSAGES

1. Capture More Leads

Clicking to send pre-recorded messages is instant and takes a fraction of your time. By speeding through answering machines with voicemail drops, you can reach the good leads faster and capture more of them in less time. Surprisingly, to be more productive on the phone, you can do a little less talking to get more action.

2. Save Your Voice

Sounding enthusiastic and proud about your product or service gives prospects a reason to feel the same way. It's difficult to do this though if you're drained of energy from all the talking your job requires. By pre-recording your voicemail messages ahead of time, your voice will thank you later, and you'll have plenty of positive energy to share when chatting with clients who do answer the phone. So, skip the small talk so you can save your energy for the bigger conversations.

3. Become More Accomplished

If you're a busy person with a lot of responsibilities to tend to, you don't have time to leave dozens or even hundreds of voicemails all day. By automating this single task, imagine all the other things you could get accomplished. When you send pre-recorded messages, you can get more things done for your business.

4. Save Valuable Time

Let's assume a sales rep leaves four 1 minute voicemails per hour during an average 170 hour working month, but decides to switch from hand dialing to using the click dialer and voicemail drop automation technology with the Cricket.

The time and productivity saved is staggering. A single sales rep will save 11.4 hours of total talk time every month by just using voicemail drops.

With a team of 20 sales reps, that adds up to a whopping 228 hours saved in just one month.

OTHER FEATURES

Cricket has a bundle of other features that give you the ability to:

- Display any legitimate Caller ID
- Receive inbound calls with voicemail
- Record conversations
- Transfer and conference calls
- Make & receive unlimited calls to the USA & Canada

THE BEST CALL OF YOUR LIFE

Clicking to call and automate voicemails with Cricket Click Dialer is like putting your sales team on the path of least resistance to making phone calls, building relationships with customers, and selling them your product or service. It's a million times *better* and *faster* than dialing by hand or speaking to answering machines.

Ready to make the *best* call of your life? Give your sales team Cricket Click Dialer, the best automation tool for prospecting and making big leaps in productivity. You'll reap the benefits beginning with your very first click. ■

Get your free trial and see all the other features by visiting:

www.CricketClickDialer.com

or call Electronic Voice Services at

1-800-713-8353 or 1-972-713-6622

VERINT®

The Customer
Engagement Company™

Unraveling Automation

How the Latest Technology Can Benefit Your Business

Automation is gaining traction for deployment across the enterprise, fueled by the need for organizations to continually innovate their offerings, accelerate time to market, and maintain a competitive advantage in today's digital world. By applying the latest advances in analytics and artificial intelligence (including natural language processing and machine learning) to functions previously performed by humans, organizations can realize game-changing benefits in how they engage and serve customers, and how they maximize their workforces.

It's clear that automation is poised to play a vital role in the future of customer engagement—and in helping enterprises achieve their strategic objectives. In addition to offering obvious benefits, such as higher revenues and lower operating costs, automation can drive greater customer satisfaction, since processes can be completed faster, with greater security and fewer errors.

DELIVERING A BETTER CUSTOMER EXPERIENCE

Automation is playing a key role in intelligent customer engagement. Through natural language processing, for example, you can analyze customers' individual preferences and then automate the self-service path presented to them. In fact, many customers prefer this tailored approach over traditional IVRs, and the cost savings to your business can be impressive.

With Voice of the Customer automation, you can apply analytics to speech, text, social, and survey interactions to automatically reveal rising customer trends that you may otherwise be unaware of. And there's no need to predefine search terms. Armed with this insight, you can take action quickly to nip problems in the bud or capitalize on competitive opportunities.

Increasingly, today's contact centers face the need to authenticate legitimate

customers in a way that's effective, but unobtrusive, while identifying fraudsters as quickly as possible. Recorder-embedded voice biometrics can authenticate callers faster, more easily, and more securely than traditional methods of authentication, while providing high levels of accuracy. With this type of automation, both customers and businesses benefit from safer, more secure interactions—and faster authentication, leading to more efficient, cost-effective service and better overall experiences.

EVOLVING THE "FUTURE OF WORK" WITH AUTOMATION

Automation is expected to change the workplace profoundly by enabling organizations to offload manual, tedious, and error-prone tasks from employees to software robots, freeing your employees to focus on more high-touch, strategic customer care.

Through robotic process automation, for example, organizations can completely replace the need for manual processing of specific tasks or entire multistep processes within a functional area, automating them on a virtual desktop or back-office server and operating around the clock. The same technology, referred to as "attended robotic process automation," can also be used on employees' desktops to help them do their work faster and more accurately. Both types of automation are particularly suited for labor-intensive processes, such as claims or mortgage processing, and can help reduce turnaround times significantly.

As software robots take on the routine, repetitive tasks, organizations can focus their staff on more value-added activities that help cultivate deeper customer engagement, enhanced Net Promoter Scores®, and greater competitive differentiation. Since this type of work can add greater depth and satisfaction to daily activities, it can help drive employee

engagement and retention. Taken a step further, combining automation with knowledge management solutions can provide employees with in-the-moment guidance on how to do their jobs more effectively. Knowledge articles can be automatically surfaced to staff based on customer context, or to customers themselves in self-service environments. Similarly, employees can be served proactive scripts that help them complete tasks or obtain information quickly. This in turn can reduce staff effort and transaction times—and the costs associated with them. It's a win for everyone—customers, employees and your enterprise.

Even traditional quality management—a quintessential part of workforce optimization—is being revolutionized through automation. The latest automated quality management solutions can automate the entire QM process, from scoring evaluations to assigning coaching, enabling supervisors to spend less time evaluating and scoring interactions and more time developing agents. These solutions enable the fair and continuous feedback that employees crave, the compliance coverage organizations require, and the insights needed to deliver engaging experiences that convert customers into loyal, lifelong fans.

INTERESTED IN LEARNING MORE?

Contact Verint today to find out how our solutions can help you leverage automation to simplify and modernize your customer engagement operations, drive greater business value for your organization, engage and empower your staff, and deliver world-class customer experiences. ■

Contact Us:
1-800-4VERINT
www.verint.com/engagement
www.verintblog.com



The present and future of sales with intelligent automation

"Give them what they want" has always been the underlying theme of selling. Find the prospect. Discover their needs. Provide the solution. It's a seemingly straightforward process that becomes increasingly complicated by rapidly changing customer demands and a noisier-than-ever marketplace.

Sales teams recognize that being first to the sale is often the difference between net new revenue and a missed opportunity. Yet many teams are sabotaging their own efforts by relying on outdated tools, technologies, and processes no longer suited to modern buyer demands that slow the sales process to a crawl.

Today's customers--no matter the industry--want faster and more detailed proposals, simpler and smoother sales processes, and more consistent and personalized buying experiences. But many sales teams still employ too many tools, disparate data systems, and inconsistent processes that make it nearly impossible to address those demands.

In fact, the average sales rep can spend more than two-thirds of their day on remedial and repetitive tasks like updating information in the CRM, toggling among systems searching for information, and copying and pasting it into quotes or proposals--all of which is done manually.

Wasting time on lower value activities results in slower document creation, inaccurate information, and longer sales cycles that put teams at a significant disadvantage. And as their competitors continue to undertake digital transformation programs in an effort to gain more efficiency and speed, sales organizations that rely on legacy systems and "dumb" technology will see that disadvantage only get worse.

INTELLIGENT AUTOMATION TO MEET MODERN DEMANDS

There's no shortage of sales enablement tools like predictive platforms and buyer

journey orchestration solutions that make identifying and communicating with prospects faster and easier. But reaching a prospect first is only valuable if you're able to maintain that velocity through to the sale.

Every stage in the sales process—from prospecting to renewals—needs to be faster, more accurate, and better coordinated across sales, legal, and customer success teams. Sales reps need transparency and visibility into their pipeline and see information at-a-glance to execute on an action plan. They need to make quick updates to all their account records to keep information current and accurate, while also identifying quick-win opportunities or deals faster. They need to be able to quickly mobilize all that data into quotes, proposals, contracts, and then accelerate the negotiation process.

Intelligent automation (machine learning + automation) solutions are key to making the pipedream a reality. Intelligent automation tools eliminate many of a sales team's most time-consuming, repetitive tasks and enable them to focus more intently on revenue-generating activities. In fact, organizations replacing outdated, manual processes with automated ones can help improve overall efficiency by nearly 20 percent.

With intelligent automation tools, sales teams can create "smart" document templates to display relevant account and deal information and pull information from various databases or systems to create proposals and contracts with just a single click. They can work with legal teams to develop pre-approved clauses for contracts that streamline the contract review and approval process, and then update their activities across records and accounts in Salesforce from a single interface.

Intelligent automation benefits everyone. Sales reps are freed from the burden of repetitive data entry to spend more time working on prospecting and

securing new business. Procurement, legal, and other internal teams are looped into the process with complete transparency and visibility. And customers can enjoy clear, easy-to-understand documents, faster negotiations, and a quicker path to adopting the products and services they need.

PREPARING FOR THE FUTURE

High-performing sales organizations are twice as likely as underperforming organizations to automate as much of their sales process as possible. But even teams employing automation technologies today to gain an edge need to think about how the technology can help them maintain it in the future.

By 2020 mobile workers will account for more than 70 percent of the U.S. workforce. Digitally-minded millennials will make up an increasingly greater portion of the workforce and other technologies like artificial intelligence (AI) will continue to evolve and find new uses in the sales function.

Intelligent automation solutions are purpose-built to be extensible and to adapt to evolving business demands. They already provide robust mobile capabilities, delivering essential information sales reps need to do their best work right to their fingertips. And they integrate easily with existing systems or new ones coming down the pike.

As the old ways of selling are slowly replaced by newer ideas and the newer ideas eventually become the old ways, the need for transformative technologies will always remain. Intelligent automation solutions are the present and the future of sales and are key to remaining relevant and competitive in the years to come. ■

Learn more about how to use automation solutions to streamline sales processes and position your team for future success at getconga.com.



Disrupting Forecast Management and Pipeline Reviews: 6 Data-Driven Best Practices

Selling isn't easy. According to the data, neither is hitting quota. In their "2017 World-Class Sales Practices Report," CSO Insights revealed that the percentage of sales people making quota dropped from 63% to 53% from 2012-2016. Last year alone, quota attainment fell 4.2% from 57.2%, illustrating the relentless pressure in the market.

What separates under performers from those who are able to make or exceed their number?

While sales has adopted a new tech stack for several key processes including prospecting, gathering intelligence and driving engagement, when it comes to forecasting and pipeline reviews, the majority are still using CRM reports and spreadsheets. These methods rely on the art of selling, or the intuition-based human predictions that have proven to be inaccurate.

Enterprise sales teams need to move beyond traditional, legacy tools and adopt a data-driven forecasting and pipeline review solution that leverages Artificial Intelligence to complement human judgment.

Here are 3 *Forecasting* and 3 *Pipeline Review* Best Practices that leverage AI and a data-driven approach to deliver better accuracy and outcomes.

FORECASTING:

1. Leverage AI for an Accurate Top-Down Forecast on Day One of The Quarter

On the first day of the quarter, an advanced forecasting tool should be able to predict — within 7% accuracy — where the business will land. Despite the poor data hygiene common at most organizations, powerful machine learning algorithms see through dirty data to

produce incredibly accurate results and provide early insight into how the quarter is set to unfold. Sales leaders use this critical window of time to take action early and proactively impact the quarter

2. Complement Human-Based Intuition In Bottom-Up Forecasts With AI

The traditional bottom-up forecast relies upon complicated layers upon layers of human judgment. At the end of the process, all deal context is obscured, leaving only the last layer of judgment visible. With the help of unbiased machine learning forecasts, reps become more accurate at committing deals. As deal-level forecasts become more accurate, they roll up to create a more accurate organizational forecast.

3. Easily Determine What Changed In The Forecast And Why

Current tools show where the forecast stands currently, but they do a poor job of revealing how the forecast changed over time. Data-driven forecasting systems enable sales teams to see what changed week-over-week, or during any two points in time. With advanced tools sales leaders can drill down and see which deals impacted the forecast positively and negatively across every segment of the business.

PIPELINE REVIEWS:

1. Review Exactly What Changed Since Last Week

In a typical pipeline review deals are sorted by forecast category and sub-sorted by deal size. Sales managers and reps start at the top of the list and work their way to the bottom, reviewing each deal. Managers and reps waste time looking at the wrong deals, while overlooking deals that need immediate action.

With advanced platforms, changes to the pipeline are viewable by changes

made that day, over the last week, or the last month. Seeing these changes ensures the right deals rise to the surface for discussion. Deals should be grouped into three main buckets for discussion:

- Deals that have had positive movement
- Deals that have had negative movement
- Deals that have had no movement

2. Review New Deals

The essence of building quality pipeline is making sure that you are constantly adding new deals to the pipeline, and yet most pipeline review processes hardly touch on this. With an optimized system, managers can view net new opportunities, and provide positive feedback to reps who are focusing on prospecting, adding new deals to the pipeline, and progressing early stage deals.

3. Plan for Next Quarter

Whether sales teams forecast monthly or quarterly, the majority of pipeline reviews focus on deals that are in-forecast for the current period, with little to no attention being paid to the following period until the beginning of a new quarter. With the use of data and predictive technology, managers can see exactly how much additional pipeline is needed today to hit future targets and eliminate the "mythical 3x pipeline estimation."

The success of salespeople impacts the success of the company. Fixing sales people's ability to forecast accurately and move pipeline, increases the company's ability to hit higher revenue targets. Ready to implement these best practices? Contact Aviso today to learn how. ■

Some Big Numbers for Small Businesses to Embrace in 2018

While forming your New Year's resolutions, keep these eye-popping stats in mind

THE START of a new year means it is time for resolutions, and not just vows to lose weight or exercise more. With business and technology changing so rapidly, your company needs to be in perpetual resolution mode. Here are a few numbers to help focus your efforts for 2018.

SALESFORCE'S EINSTEIN MAKES 475 MILLION PREDICTIONS DAILY.

We all know that artificial intelligence (AI) has been one of the most talked about technologies over the past 12 to 18 months. In many ways, it felt like it was precisely that: talk. But during Marc Benioff's keynote at Salesforce's Dreamforce event in November, a stat on one of his slides totally jumped out at me: Every day, Einstein, Salesforce's AI technology, makes 475 million predictions across all its clouds.

To me that number is astounding. Einstein was announced just a little over a year ago, and now it's spitting out predictions like crazy. And that's just from one vendor with 150,000 customers. With all major CRM vendors having AI initiatives now, probably more than a billion predictions are being generated per day to help companies improve customer interactions. And it's still early, so now's the time to see how you can leverage one of these platforms to more efficiently and effectively engage customers and prospects.



EINSTEIN WAS ANNOUNCED JUST OVER A YEAR AGO. TODAY IT'S SPITTING OUT PREDICTIONS LIKE CRAZY.

IN 2017, 330 MILLION PEOPLE CONNECTED WITH A SMALL BUSINESS ON MESSENGER FOR THE FIRST TIME

This number comes from a survey Facebook commissioned toward the end of 2017, and it indicates that people are quickly transferring their comfort level with Messenger for talking with friends and family to interacting with companies. According to Linda Lee, a member of Facebook's Strategic Partnerships team for Messenger, "Some of it is around [asking] questions [about] specific services or products where they need more details or specifications. Then it's also about dealing with customer care issues—perhaps they've already bought a product or a service and have a question, or an issue's come up."

When you see a number like 330 million people, you have to take notice—and you have to expect the trend to accelerate in 2018.

TWO HUNDRED MILLION INSTAGRAMMERS VISIT AT LEAST ONE BUSINESS PROFILE EACH DAY.


According to a release sent out by Instagram at the end of November, 80 percent of accounts on the platform follow a business, and 200 million Instagrammers visit the profile of a business every day. Perhaps related, the number of businesses on Instagram is now 25 million, up from 15 million in July.

According to the company, one in three small businesses on Instagram say they've built their business using the platform; 45 percent say they have increased sales; and 44 percent say the platform helps them sell in additional cities, states, or countries.

With video and images capturing more of our collective attention, sites like Instagram are growing in importance for B2C and B2B companies. Leveraging the wide reach of Instagram is allowing small businesses to interact with customer and prospects in more meaningful ways that are adding up where it counts.

ON CYBER MONDAY, SMALL BUSINESSES SOLD 140 MILLION PRODUCTS ON AMAZON'S PLATFORM.

With Amazon, there are a lot of eye-catching numbers I could list here, like the \$1 billion it has lent to small businesses since 2011. But what caught my attention was Cyber Monday 2017. According to a number of reports, the \$6.59 billion in transactions that day made it the biggest online sales day ever, and Amazon's chunk was undoubtedly huge. Cyber Monday was also the biggest sales day ever for small business and entrepreneurs selling on Amazon's platform, as customers ordered nearly 140 million products from small businesses around the world. Amazon says that the number of mobile shoppers ordering through its app jumped 50 percent. So you'd have to think a healthy number of the products sold by small businesses happened via mobile device.

All of these big numbers point to a massive sea change in customer engagement going forward. Some developments are further along than others, but these numbers illustrate just how quickly the playing field is changing, and how the accelerated adoption of technology is driving all of it. So let these big numbers help shape your business's New Year's resolutions. 

Brent Leary is cofounder of CRM Essentials, an Atlanta-based advisory firm focused on small and midsize businesses. He is also the author of Barack 2.0: Social Media Lessons for Small Businesses.

Businesses Need to Know GDPR

Companies worldwide—and marketers in particular—need to prepare for the regulation, which takes full effect in May

The European Union's General Data Protection Regulation (GDPR), which will become enforceable May 25, is being hailed as the most important change in data privacy regulation in 20 years. Companies worldwide need to prepare now because once the law takes effect, violators could face fines of up to 4 percent of their annual turnover.

The GDPR is designed to harmonize data privacy laws across European Union member nations and to reshape the way organizations approach data privacy. Under the terms of the law, companies must get “explicit” consent from consumers before collecting and using personal data about them. The EU's GDPR Commission defines personal data as “any information relating to an individual, whether it relates to his or her private, professional, or public life. It can be anything from a name, a home address, a photo, an email address, bank details, posts on social networking websites, medical information, or a computer's IP address.”

And the rules apply not just to companies based in Europe but to companies anywhere in the world that do business with consumers in any of the 28 nations that make up the European Union.

Eric Holtzclaw, chief strategist at PossibleNOW, a provider of preference management and marketing solutions, and author of *Laddering: Unlocking the Potential of Consumer Behavior*, says the new law will change the traditional paradigm for most businesses. “In this



case, it's thinking about that customer in a different way. They [have a right to] know what I have on them and how I'm using it,” he says. “What this does is highlight what a company may know about me, or at least I have the right to know it.”

Experts agree that the new law has big implications for marketers specifically. Constellation Research has put forth a five-item GDPR preparation checklist for marketers.

The first recommendation is for chief marketing officers to appoint an individual or team to oversee the handling of marketing data. Additionally, it proposes a thorough review of current mailing lists and all data collection and handling procedures.

The second recommendation consists of actions to take when collecting personal data. On websites and web forms, this includes providing clear consent wording and establishing an

age-verification process. Other ways to get the required consent could include check boxes or other fields for consumers to mark indicating their willingness to receive marketing content. For validating countries, a “Country of Residence” field should also be available.

The third recommendation is to actively manage existing contacts and leads in a database. Companies should consider sending all active European contacts a new request to re-verify their email addresses and renew their consent to receive communications by email, mobile app, phone, or direct mail. Additionally, companies should consider creating a communications preference center that allows customers to manage their own preferences.

The fourth recommendation is to include clear privacy policy directions that detail what data is being gathered, how the data is stored, and how to contact the organization. Additionally, companies should notify customers about privacy policy updates.

The fifth recommendation is to design a data breach plan. This includes publishing as much information about the breach as possible, as quickly as possible, on the company website or via a microsite as well as providing assistance to customers who suffer negative consequences as a result of the breach.

“Even if it truly doesn't impact your organization, awareness and knowledge is power. At least understand what GDPR is,” advises Cindy Zhou, vice president and principal analyst at Constellation Research. “Being prepared is better than not. Knowing what [GDPR] is, understanding it, and having an action plan is very important. GDPR for Europe is just the beginning. [By] having a plan and being prepared for this, if regulations continue to change and tighten later on, you're at a great spot.” —Sam Del Rowe



Marketers Must Watch Out for Video Ad Fraud

Video ad fraud is a threat, but companies can take precautions to protect their budgets and reputations

At least 100 companies fell victim to video ad fraud schemes recently, having spent portions of their ad budgets to have their creative materials appear on “zombie websites,” which greatly inflated page view counts to make it seem that more people had engaged with the ads, a report in BuzzFeed detailed.

Ford, Unilever, MGM, and Hershey’s were just some of the companies that lost money after buying ad space from seemingly credible partners in their supply chain.

“Ad fraud is one of the most important challenges facing the industry,” says Leslie Bargmann, director of client services at Jun Group, an advertising company. “And the most popular placement, video, is not immune to this multibillion-dollar scheme.”

Video advertising is a prime target for fraud because the cost-per-thousand (CPM) impressions “are so high,” explains Reid Tatoris, vice president of product outreach and marketing at Distil Networks, a bot detection and mitigation company. Advertisers are willing to pay more for viewable videos, and even more for completed views. But “smart fraudsters can easily program bots to game both of these metrics.” Distil Net-

works has conducted studies that prove that video completions are lower when ads are targeted at verified humans. “This makes sense because humans don’t like watching ads, while bots are happy to sit through them.”

Programmatic video has also been so problematic because most executive-level marketers don’t understand how the supply chain works, according

“Humans don’t like watching ads; bots are happy to sit through them.”

to Jason Beckerman, CEO of Unified, a business intelligence platform designed to help companies get the most out of their advertising budgets. He points out that too often they rely on third-party agencies to help them buy ad space, and the result is subpar performance. Such agencies are mostly concerned with “getting the job done” as opposed to getting it doing right, because an unspoken goal of theirs is to spend the money as quickly as possible.

In agreement is Vlad Shevtsov, director of investigations for Social Puncher, one of the advertising companies whose research

helped expose the video ad fraud scheme for BuzzFeed. He says that, as horrible as it might be, the main goal of most publishers and advertising systems is to sell cheap traffic to companies for as much as they can. “Therefore, no one on the side of advertising systems is interested in strict verification: More advertising views equal more money.”

In such an environment, companies need to take proactive steps to protect their reputations and make sure they are not being duped by malevolent players.

According to Beckerman, technology can be used to alleviate some of the difficulties companies have. Unified provides a transparency tool to help companies see everything that goes on in their digital advertising ecosystems and make sure that agency partners are not doing anything they shouldn’t be, he says.

However, Shevtsov argues that “software cannot solve the problem of advertising fraud.” He holds that since people are looking at ads, people, rather than machines, should be evaluating its effectiveness.

Tatoris recommends that companies buy direct when possible. “I know this is a pain, but if you are buying inventory that’s been resold five different times,

Fast Facts & Figures



\$3.73
billion

The **current** value of the **global interactive voice response (IVR)** systems market.

\$5.54
billion

The **projected** value of the **global IVR** systems market by **2023**, growing at a **compound annual rate of 6.83 percent**.

SOURCE: MARKETANDMARKETS' "INTERACTIVE VOICE RESPONSE MARKET BY TECHNOLOGY, DEPLOYMENT, VERTICAL, ORGANIZATION SIZE, SOLUTION, SERVICE, AND GEOGRAPHY—GLOBAL FORECAST TO 2023" REPORT



\$13.27
billion

The **current** value of the **global market for contact center software**.

\$29.13
billion

The **projected** value of the **global contact center software market** in **2022**, growing at a **compound annual rate of 13.8 percent**.

SOURCE: MARKETANDMARKETS' "CONTACT CENTER SOFTWARE MARKET BY SOLUTION, SERVICE, DEPLOYMENT TYPE, ORGANIZATION SIZE, VERTICAL, AND REGION—GLOBAL FORECAST TO 2022" REPORT

you run a really high risk of hitting a video farm."

He also warns against using completed views as an indicator that someone watched your ad; all that means is the ad played through to completion. He suggests that companies use follow-up actions to confirm that real people watched the ad and then took some step as a result.

"First, advertisers should partner with trusted verification vendors" that track where ads run, verify human viewing,

and measure ad interactions, Bargmann suggests. "Not all video placements are created equal, and advertisers would do better selecting placements that are in-app and opt-in in nature. In-app ads are highly regulated by Google and Apple, and opt-in placements must be initiated by a person to appear.

"In the end, advertisers always do best when working with trusted partners, purchasing placements that they understand, and utilizing clear measurement guidelines," he concluded. —Oren Smilansky

Ads.txt Is Here to Help

Because ad fraud is such a common problem, the Interactive Advertising Bureau's Tech Lab created ads.txt, a simple solution that makes it significantly harder for scammers to offer counterfeit ad inventory, also commonly referred to as spoofed domains.

The practice, which has been identified as the largest threat to the digital ad economy, typically involves fraudsters who sell ads on one website, mobile app, or other digital property but then actually serve them up on another site at a much cheaper rate. The original site loses money, and marketers waste money buying ads that nobody sees—unless you count simulated human web traffic that these fraudsters create with non-human bots and real human users who are in on the scam.

Ads.txt aims to help fight fraudulent inventory for mobile, video, and display ads, identify authorized digital inventory sellers, and increase advertising transparency. Using ads.txt, publishers and distributors identify the companies they authorize to sell their digital inventory, including domain owners that sell on exchanges through their own accounts; networks and sales houses that sell on behalf of domain owners; and content syndication partnerships where multiple sellers represent the same inventory.

IAB officially published the voluntary ads.txt standards in September and initial adoption was slow, but the initiative is expected to pick up steam as ad buyers pressure sellers to effectively adopt ads.txt or be blocked. Google, one such provider, recently fell victim to ad fraud and vowed to only buy from publishers that have adopted ads.txt going forward. Many other prominent media organizations are following suit.

To find out which sites are using ads.txt, advertisers can type in a website name and add "/ads.txt" at the end of the URL. A list of links will appear displaying all the sellers that have been verified by the publisher.

Tamer Hassan, chief technology officer at WhiteOps, a provider of automated threat protection, was one of the architects of ads.txt.

"Ads.txt is one of the least expensive yet most effective defenses against many methods of domain spoofing. By listing the companies authorized to sell its inventory, a publisher makes it easy for an advertiser to verify the legitimacy of the purchase. This is an important architectural change to programmatic advertising that will have a lasting impact," he says. —Leonard Klie

ON THE SCENE: SALESFORCE.COM'S DREAMFORCE 2017

Intelligence Is the Fourth Industrial Revolution

Salesforce.com unveiled new services for its Customer Success Platform and a new strategic partnership with Google

Salesforce.com considers 3-D printing, biotechnology, robotics, autonomous vehicles, quantum computing, and the Internet of Things to be interrelated, all falling under the artificial intelligence umbrella.

All of these technologies are tools to build better relationships with customers, according to Salesforce.com's chairman and CEO, Marc Benioff. "This is the fourth Industrial Revolution," he said in his opening keynote during his company's annual Dreamforce users' conference in San Francisco in early November. "We're connecting to our customers in new ways with all these amazing next-generation technologies."

With this in mind, Salesforce.com at the event unveiled five new services for its Customer Success Platform: myTrailhead, myEinstein, myLightning, mySalesforce, and myIoT.

MyTrailhead aims to help companies create interactive learning for employees.

MyEinstein enables companies and private developers to build custom AI apps across Salesforce. For admins, it has two key features: Einstein Prediction Builder, to help companies anticipate the business outcomes of the apps they build, and Einstein Bots, for building, training, and deploying customized service bots. For



Salesforce.com's chairman, Marc Benioff, announced an array of "next-generation technologies" at Dreamforce.

developers, it has Einstein Language and Einstein Vision, APIs launched in June for building AI-powered CRM apps.

MyLightning, the latest iteration of the Salesforce Lightning framework for application development, aligns the applications, portals, and experiences that companies build with their respective brand identities. MyLightning includes

"We're connecting to our customers in new ways with all these amazing next-generation technologies."

special features for incorporating brand images, colors, backgrounds, and more; customization at scale; controlling when components appear on record pages via filters and other logic; creating guided, visual processes with Lightning Components and adding them to records, apps, portals, or consoles; and out-of-the-box solutions with industry best practices, Lightning Components, and business logic.

MySalesforce is the next generation of Salesforce on mobile. Key features enable companies to build apps quickly,

with themes to match any brand, and the Listing Wizard, which helps companies publish their custom mobile apps to the Apple and Google stores. MySalesforce apps are built with the Salesforce Lightning App Builder, which has a drag-and-drop library of configurable components, such as calendars, dashboards, and task managers.

MyIoT is a response to the disconnect between developers building IoT solutions and the sales, marketing, and service teams using IoT data. MyIoT begins with IoT Explorer, a new platform for using IoT data to build, iterate, and deploy proactive sales, service, and marketing business processes. IoT Explorer connects device, sensor, and application data to the Salesforce Platform. "All of this together is the smarter, more personalized Salesforce that we're working on, with your feedback," Benioff said. "Whether it's in Trailhead or Einstein or Lightning or Salesforce mobile or in IoT, all of this is in this incredible next-generation platform."

Salesforce also announced the Quip Collaboration Platform to help teams collaborate faster and more interactively in a single, live document. The Quip Collaboration Platform features Live Apps, interactive custom-built applications that can be embedded directly into any Quip document to bring all relevant content into the document.

In addition, Salesforce announced a new strategic partnership with Google. The partnership will deliver new integrations that connect Salesforce with Google Analytics 360 and G Suite.

The integration with Google Analytics 360 makes audiences and campaign data from Analytics 360 available in Salesforce's Marketing Cloud, and makes sales data from Salesforce's Sales Cloud available in Analytics 360.

The integration with G Suite enables customer intelligence to be surfaced seamlessly between Salesforce Lightning, Quip, and the G Suite, including Gmail, Google Sheets, Google Drive, Google Calendar, Google Docs, Google Slides, and Google Hangouts. —Sam Del Rowe

ON THE SCENE: GILBANE DIGITAL CONTENT CONFERENCE 2017

Marketers Need a Two-Way Dialogue

To connect with customers, content will require emotional and contextual appeal

New technologies such as the Internet of Things (IoT) and adaptive content can help companies craft exceptional customer experiences, speakers asserted at this year's Gilbane Digital Content Conference in Boston in late November.

That's a lesson that coffee machine maker Keurig learned early on, according to Rachael Schwartz, vice president of product management and general manager at Keurig Connect, Keurig Green Mountain. Schwartz oversees her company's consumer beta testing of connected coffee makers. "We at Keurig are thinking about using enhanced digital experiences and Internet of Things (IoT) in order to transform our relationship with our consumer to be a two-way conversation instead of one-way advertising and dialogue," she said.

"Over the past 20 years, we have won our way onto the countertops of 20 million homes in the United States," she continued. "We reached these first 20 million consumers organically through providing this delicious coffee in a convenient and personalized way, but we've been innovating ever since on the product side. To get to the next 20 million homes, we really need to do more than just come up with new coffee makers that have new features and settings. We really need to innovate on the whole customer experience."

But building that connection requires more than just linking a product or device to the internet, as Keurig also discovered. "It's really this stronger connection with the consumer. IoT

enables this two-way dialogue with the consumer, enables us to feel like we have a conversation with them and go back and forth with them, leading to a stronger attachment to the brand," Schwartz said. "The real power in digital market-



ing comes from assembling a coherent set of technologies that enable a never-ending, self-renewing conversation with your consumer. It can become its own ecosystem that's always drawing in new voices and new customers."

Another key to enabling that kind of connection will be imbuing technology with emotional intelligence, according to Gabi Zijderfeld, chief marketing officer at Affectiva, a provider of emotion recognition software and analysis.

"We believe that this lack of emotional intelligence in technology is a problem because human interactions with technologies that are not emotionally aware are at best transactional and superficial and, most of the time, fairly ineffective," she said.

Zijderfeld sees the merging of intelligence and emotion as "inevitable."

"Essentially what we're doing is bringing this emotional intelligence to technology so that systems can sense and adapt to human emotions, and so that corporations can get emotion data or emotion analytics that gives them much deeper insight into their consumer engagement. We call this artificial emotional intelligence or emotion AI."

Once that information is available, companies can then develop an adaptive content strategy to tailor messages based on persona and context, according to Juhee Garg, senior product manager at Adobe.

"The benefit that you get from adaptive content is the ability to create your content once and deploy it everywhere," she said. "From one single piece of content, I can now create renditions for different devices, for different formats—PDFs or websites, or even different personas. What you get is a single source of content that is now being used to create different renditions."

Adaptive content like this can be useful in a number of scenarios, Garg went on to say. For example, if a product name changes, the company does not need to make the change in many different places; instead, the change is made in a single place and reflected everywhere. Similarly, a company using content across different countries would only need to translate it once and it

could flow across other languages, dialects, or domains.

Another huge benefit is that content is machine-deliverable—because semantics and contextual information are embedded within the content, it can be parsed by machines, which can then understand what kind of

content is relevant and where that content should be shown.

That is the future of marketing, and it requires a new level of intelligence, an idea speakers reiterated throughout the conference. —Sam Del Rowe

"The real power in digital marketing comes from assembling a coherent set of technologies that enable a never-ending, self-renewing conversation with your consumer."

REQUIRED READING

Avoid Dealing with Difficult Customers

Some customers are just worth letting go, regardless of their monetary value

It's a truism in business that the customer is always right. But in their new book, *Dealing with Difficult Customers*, authors Noah Fleming and Shawn Veltman argue that this shouldn't always be the case, and that there are times when it is perfectly fine to "fire" the customer. Associate Editor Oren Smilansky caught up with Fleming to learn how companies can avoid doing business with problematic customers.

CRM magazine: What was the impetus for this book?

Noah Fleming: There's an interesting twist to the book: It's not really about dealing with difficult customers. The majority of it is about asking what we're doing in our business that's making [customers] frazzled, upset, or angry. The book is really about what can we do to improve, to avoid difficult customers in the first place.

How do companies avoid attracting bad customers?

A lot of businesses are willing to take in anybody and everybody. If you're willing to do whatever it takes to get cash from anybody, your chances of having great relationships with customers are pretty diminished. It's better to focus on the right people. This comes down to sort of Sales and Marketing 101: Know your customer. And, more importantly, know the customers you're trying to attract, that make the most sense for your business, and go after them.

What companies have been successful with this approach?

Southwest Airlines has been very good at attracting the type of customer that makes sense for them, and that means a customer who's willing to wait in line with everybody. There's no sort of class segmentation; it's first come, first serve, and they're really good at setting clear expectations of who they are. If you want a first-class, luxury travel experience, go elsewhere, because you're not going to get it there. It's about understanding the expectations gap and understanding what you've promised and what you're delivering, and making sure that you can.

In the book you assert that in fact the customer *isn't* always right. Can you elaborate?

The customer is not always right, but that's something that

a lot of businesses believe. For example, they believe that the way of Zappos, of treating every customer complaint as if it is accurate and true, is valid, so they try to follow that model. But that model works for Zappos because it's a billion-dollar company. It doesn't work for everybody else, and so we need to understand that some customers will be very hard to please; some customers are insatiable; and some customers are just complainers.

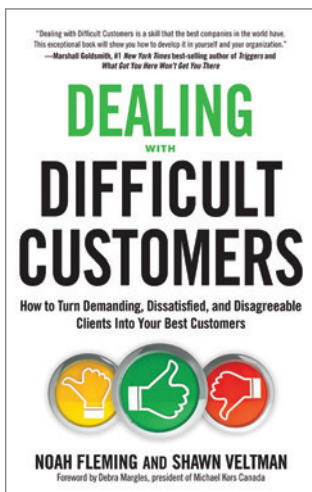
How can companies figure out if a customer is truly wrong?

Look for patterns. One of the things we talk about in the book is this practice of internal benchmarking. If you don't know, for example, the 10 most common complaints or criticisms your company has had in the past six months, then it's very hard to ask yourself, "Is the customer really right, or is the customer incredibly wrong?" But if you start to track this stuff, you start to see, "Hey, we made this mistake 10 times in the past 60 days; what can we do about this?" Simply ask if you are doing things to create these feelings with

customers. I think in the case of United Airlines and David Dao [the passenger who was forcibly removed from a flight in April 2017 after he was randomly bumped to make room for United employees], for example, he probably should have gotten off the plane. But did he deserve to get beaten and bloodied to a pulp? Absolutely not.

Can CRM technology help people figure out when it is appropriate to fire a customer?

CRM can be a great tool, for example, to watch how many issues you have with a customer. So whether it's issues to reduce pricing; whether it's requests for discounts—a lot of companies keep history on this stuff. I talked about some of them in my first book, *Evergreen*. Amazon was firing customers who were obsessively returning products. They were actually telling them, "Thank you for ordering with us, but, quite frankly, your account has been shut down and you're no longer able to order with Amazon." Amazon can get away with this. Others will say, "It's a lot harder for me." But the question is, is it really? Or is this customer who's causing you grief diminishing the experience for other customers?



THE CONTACT CENTER

Helping Customers Help Them



THIS YEAR, CUSTOMERS ARE DEMANDING THAT SERVICE ORGANIZATIONS BUILD OUT SELF-SERVICE, AUTOMATE WHERE POSSIBLE, AND EMPOWER AGENTS

By Oren Smilansky

IN 2018: customers serve themselves



In 2003, 48 percent of consumers felt confident that they'd be able to find what they need via self-service, research from TSIA found. Now, 15 years later, little has changed. As we open a new calendar, only 49 percent of consumers expect to be able to successfully self-serve.

This suggests that there is still plenty of room for improvement, but it would also appear that both companies and their customers are taking notice. Experts agree that one of the biggest customer service trends to emerge in 2018 will be improvement in the tools that enable customers to serve themselves.

The time is right, according to John Ragsdale, vice president of technology and social research at TSIA. While several companies have already invested heavily in self-service, clearly many have not done enough, he says.



Going forward, expect business software vendors to speed up the development and distribution of tools that will allow customers to retrieve information on their own, and also expect companies to increase their adoption of these technologies, predicts Paul Greenberg, founder and managing principal of CRM consultancy the 56 Group.

For customers with complex customer service issues or questions, “the ability to get the problem solved without a human agent will be increasingly available,” Greenberg says.

That’s because a growing pool of software vendors providing what he calls “insight engines” are stepping up to help companies take data from millions of sources and create an “ecosystem of record.”

This trend comes in stark contrast to what has been typical in contact centers. As new channels for customer contact—such as messaging platforms, chatbots, and voice interfaces—have been introduced on top of long-standing ones like email and the phone, companies have added to their agent pools, either with in-house personnel or outsourcing, observes Kate Leggett, vice president and principal analyst at Forrester Research.

“You can’t do that forever,” she says.

While this will not take shape within the next year, in the long term, Leggett predicts, companies are going to have to leverage artificial intelligence and so-called pragmatic AI, such as applications that employ machine learning, “to fundamentally reimagine customer service operations.”

Companies would be wise to begin trying to minimize agent contacts for simple, straightforward requests—including password resets, account balance inquiries, or adding to streaming service plans—with automation, she says.

But as more of these simpler requests move to self-service, contact centers can expect to encounter more complex interactions, and companies will need skilled agents on staff to handle them. “You may have to manage them differently,” Leggett says. “For example, you’re not going to manage them by productivity

and efficiency metrics. You’re going to be managing them perhaps [using] customer feedback or outcome-based metrics of success.”

EMBEDDING SUPPORT INTO B2B APPS

Ragsdale anticipates that companies will increasingly build customer support options directly into their mobile apps and desktop software. “Traditionally, we’ve had field-level help; you could click a question mark and get a description in a field.” The problem with that has been that companies have tended to rename and customize fields, making them harder to manage.

Chatbots and other tools that help consumers navigate company knowledge bases and social communities are becoming

“They like the convenience of chat. You can have a chat while you’re on a conference call, you can have a chat while you’re browsing the web or checking email. Chat is not new in the consumer world, but for B2B companies, they’re finding a lot of these consumer capabilities absolutely have a place.”

BOTS ARE HERE TO STAY

Chatbots really only entered the vernacular within the past year or so, but the hype surrounding them is not expected to die down anytime soon, according to experts.

Nancy Jamison, a principal analyst at Frost & Sullivan, has seen a lot of confusion and few successes so far. “Everyone’s talking about adding AI and virtual

“Everyone’s talking about adding AI and virtual assistants.”

ing important to customer success, “which is all about boosting adoption and consumption and [keeping] people in the app working,” Ragsdale says.

Adobe has really embraced this concept, according to Ragsdale. The company has embedded LogMeIn’s BoldChat product with click-to-chat and screen-sharing capabilities. “It’s really a great customer experience, and it’s keeping [customers] working and productive and boosting adoption and consumption,” Ragsdale says.

Many B2B companies are still resistant to chat, but shouldn’t be, Ragsdale says. One common argument against implementing chat is that customers haven’t been demanding it, just as they aren’t demanding mobile applications. That is about to change.

“People are leaving phone and email and going to chat because it’s a natural progression of how they deal with things in their consumer lives,” Ragsdale says.

assistants” to their operations, she says. “But not many people are doing it very well, or if they are doing it, they are very individual deployments that are tuned specifically to a vertical market like travel, for example. There’s not at all a widespread use of successful virtual assistants and bots yet.”

Experts also need to distinguish between simple bots and sophisticated ones. Donna Fluss, president and founder of DMG Consulting, says intelligent virtual agents (IVAs) will play a large role in contact centers of the future and become the “next generation” of self-service solutions.

While many bots are typically programmed for one task, IVAs are far more advanced, leveraging artificial intelligence, machine learning, and natural language technologies to help agents move from channel to channel, read the context of interactions, and provide agents with advice.

Greenberg expects 2018 to witness an increase in the adoption of both bots that use AI and ones that don't. The simple bots, he says, accept simple questions and provide simple answers, answer questions in a sequence, or follow through by providing customers with a number of options.

American Express has successfully deployed one of these "very simple chatbots" via Facebook Messenger, according to Greenberg. The bot can notify customers through Facebook Messenger of new charges on their AmEx credit cards, allow them to see the details of the transactions, and help them complete a number of other possible queries and responses. "That's not AI; that's just a process that's in place, and it's a somewhat robotic process," Greenberg says.

However, Greenberg anticipates the development of chatbots that do leverage AI to learn and become more powerful. Such a chatbot will work to determine the best option for a customer, but allow the customer to correct it, and it will take into account many other data points that will help assess what the user is trying to accomplish. "We're going to see this in near-real-time and real-time responsiveness," Greenberg says.

Jamison likens bots to interactive voice response (IVR) systems. "We've had IVR for 30 years or more, and we still have bad IVR out there. You can have great IVR, great speech-enabled IVR, but you can have bad IVR if you don't implement it right, if it doesn't have proper error recovery, if it doesn't answer the question or do the transaction for the caller," she says. "Having a virtual assistant isn't any different. It's got a different interface and perhaps more knowledge in the background, but if you poorly implement it, then you're going to insult your customer. You're going to make your customer mad."

Jamison expects to see problems with bots until the industry comes together to iron out a set of best practices. That, she says, is likely to start in the coming year. "So I think there's going to be a big focus

on how to go about developing those best practices."

Ragsdale and others have also noted that while chatbots have been fairly common among B2C firms, the B2B world has been slower to embrace them. "I think that machine learning component is what's really critical, and some

to be adopted by a large number of companies. "We'll see that increase," Greenberg says.

Jamison agrees, pointing out that these technologies fit in with the notion of catering to agents by giving them the proper tools to do their jobs better. This includes access to better knowl-

"We'll start seeing more of the chatbots themselves doing sentiment analysis."

of the core chatbots really don't incorporate that," Ragsdale says.

Also critical going forward will be the ability of chatbots to escalate to live agents if necessary. "That warm transfer piece is kind of the magic here" and traditionally has been a stumbling block for many companies, Ragsdale argues.

"It really is required that you do that because you don't want to say, 'OK, this has become too complex for chat, we're going to have to go to phone.' I've heard horror stories of companies that say, 'But our chat agents don't have a phone on their desk, so we're going to transfer you to a phone agent and you can start all over again.' That's absolutely what you don't want to do."

LEVERAGING SENTIMENT ANALYSIS

To that same end, companies in 2018 will step up deployments of sentiment analysis in their contact centers to help agents deal better with customers.

Greenberg expects companies like Cogito that offer the technology to "continue to grow significantly." Cogito's emotional intelligence solutions analyze customer voices to predict the outcomes of calls and to assist agents to take action that might save calls that are going horribly awry. While such technologies exist, they have yet

edge bases, guided resolutions, and next-best actions.

Equally important will be pop-ups that appear onscreen to guides agents based on a real-time analysis of conversations as they unfold. Take, for example, an agent at a debt collection agency. She might call a debtor only to learn that the person has declared bankruptcy. A speech analytics engine running in the background could identify the emotional turmoil in the person's voice and direct the agent to be more sympathetic, surfacing a script that reads "I'm really sorry to hear that. Which kind of bankruptcy did you declare?"

"That's extraordinarily empowering, because then you don't have an agent that's just stumbling along and reading through a script and upsetting the person further, because they don't want to get those calls," Jamison says.

Bringing those capabilities to chatbot technology is a natural progression. "We'll start seeing more of the chatbots themselves doing sentiment analysis," Greenberg says, maintaining that if a customer expresses concern or worry, chatbots will have more flexibility in how they try to alleviate the concern.

AUTOMATE WHEN POSSIBLE

But chatbots and other self-service technologies are not the only innovations



that are going to make waves across the contact center industry in 2018. As a rule of thumb, organizations would be wise to automate whenever and wherever possible and give contact center agents the tools they need to get their jobs done, most experts contend.

Leggett points to an insurance firm that handles about 5 million calls every year. After each of the calls, agents spent on average about 10 seconds classifying each case. “They realized that if they added real-time speech or text analytics, they could do classification automatically and more accurately than the human agent.”

Cutting 10 seconds off 5 million calls a year ended up saving the company \$8

their voice instead of a keyboard. This trend drove Amazon to add an interactive screen to its Echo Show device, the latest iteration of its smart technology equipped with the Alexa voice assistant. The screen also allows users to communicate via video.

Indeed experts expect video to become an important capability in the new and ever-evolving customer service model. “As we automate, there’s going to be less potential for making a human connection,” Leggett says, placing more of an emphasis on visual engagement channels like video, video chat, screen sharing, and co-browsing.

“Another interesting area of change and enhancement” will involve adap-

attend a baseball game together, they’d appreciate the option to submit a bid as a group. Similarly, this cohort wants the convenience of on-the-go access to schedules and the ability to make changes on the fly.

Jamison says another outgrowth of the burgeoning Millennial workforce will be a greater focus on creating better mobile apps for contact center agents and their supervisors, as well as for customers.

CHANGE IS INEVITABLE

No matter which technologies shine forth throughout the year, though, one thing is certain: Change is definitely coming to the contact center in 2018. And as that happens, companies can expect to see benefits on three levels: improved efficiency, greater customer satisfaction and loyalty, and rising strategic value to the entire organization, according to Brad Cleveland, cofounder and senior advisor at the International Customer Management Institute (ICMI).

Companies that have matured beyond the first two levels are now looking to extend the contact center’s influence into other areas of the organization, including marketing, product development, and IT, Cleveland says.

Companies in this last stage routinely use analytics to see what the technology can reveal about their customers and establish cross-functional communications channels that enable them to share innovation and ideas, he adds. They also coach and train their agents to have “business antennas” and harness desktop tools to capture insights.

“There’s a lot of innovation happening right now” in the world of customer service, Cleveland says. “If we don’t keep up with it with our technology road maps, with our strategy build-out, we’re going to be putting ourselves at a big disadvantage. It’s an exciting time, and one [in which] a lot of customer service VPs [will] get a great sense of responsibility to really be thinking ahead.” 

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“As we automate, there’s going to be less potential for making a human connection.”

million during the first year of deployment, she says. It reduced the amount of busy work agents had to do after each call and allowed agents to better connect with customers.

Leggett and Fluss both also tout AI-driven call routing as a technology to consider in 2018. In fact, Fluss says advances in “adaptive, real-time intelligent routing” will allow companies to lower operational costs by efficiently routing omnichannel contacts to the appropriate agents the first time.

Also expected to show “hockey stick growth” is robotic process automation (RPA), according to Fluss, largely because of its ability to improve customer experience, reduce operating costs, and make life easier for agents.

Conversational, voice-based interfaces will also continue to gain influence, as analysts predict that people will prefer to conduct searches using

intraday workforce management, Fluss says, noting that “companies will always look for ways to reduce operating costs.” NICE in October acquired a company called WorkFlex to bring those capabilities to its own workforce optimization suite, and Fluss expects to see more innovation in the areas of workforce management and adaptive scheduling. “It’s finally starting to catch on,” she says.

These technologies will be especially helpful as companies continue to struggle to fill their most undesirable contact center shifts, particularly during late nights and weekends, Fluss adds.

Jamison notes that the technologies will also help companies deal with a growing Millennial workforce, whose members prefer work-life balance over pay and would rather bid on shifts and work in groups. For instance, if a group of coworkers want to take the night off to

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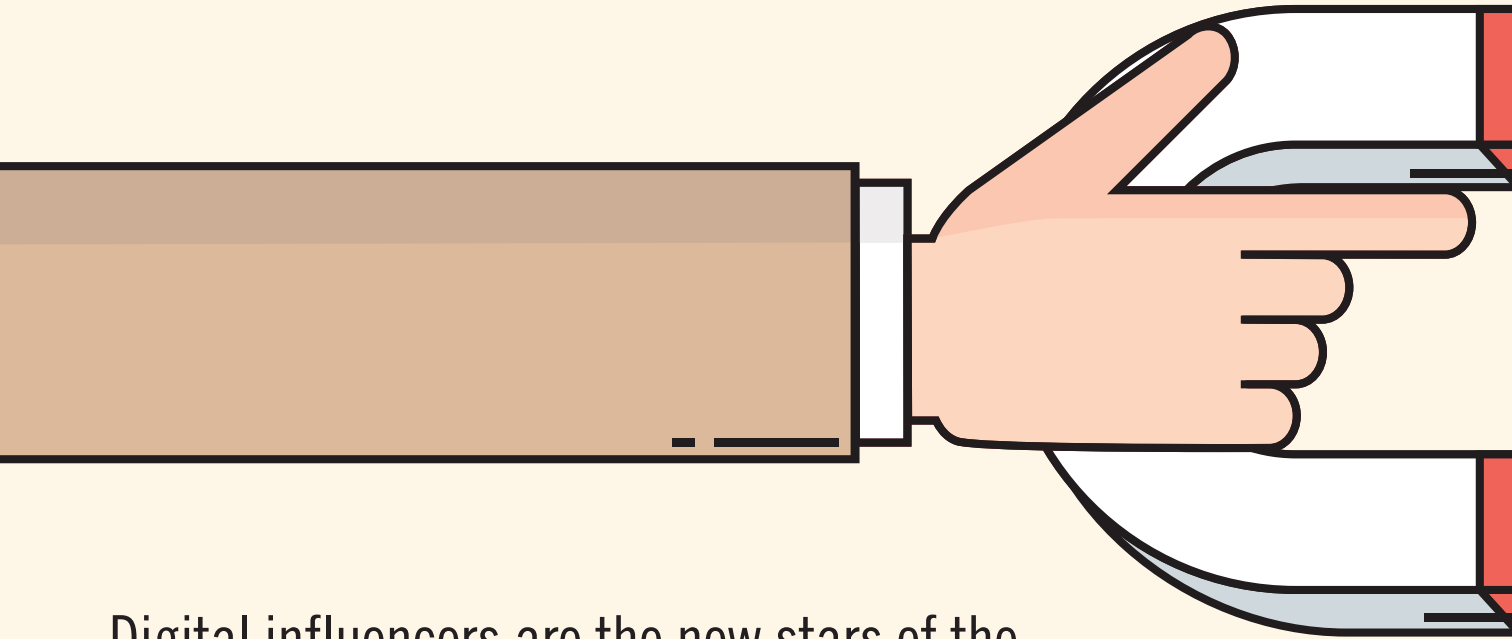
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TAPPING INTO SOCIAL'S SPHERE OF **Influen**



Digital influencers are the new stars of the internet, and the endurance of social media suggests they'll continue to be valuable.

Here's what marketers need to know.

BY SAM DEL ROWE

ce



With the rise of social media platforms like Instagram, a new category of celebrity has emerged: the digital influencer. While their names might not be as recognizable as Kim Kardashian's or Justin Bieber's, these influencers have built strong followings based on their expertise in particular areas.

Because of their reach, digital influencers have been employed by companies for various promotional purposes. An example is a promotion that Fiji Water ran last summer tapping fashion blogger Danielle Bernstein—whose Instagram handle (@weworewhat) boasts 1.7 million followers—and celebrity personal trainer Eric Johnson. The result was a workout program called BodyWoreWhat. For a one-time membership fee of \$35, users received access to eight short workout



videos and a comprehensive meal plan. In addition to sponsoring the project, Fiji kicked in a 25 percent discount off the first shipment of home delivery for its water.

Fiji is not the only company to have run an influencer-driven campaign. In fact, 60 percent of marketers commissioned influencers to make content for them in 2016, according to a recent report from Forrester Research.

For marketing and e-commerce consultant Kathryn Kerrigan, an influencer is “a person or entity with a wide network of connections, followers, or fans, and the ability to influence, change, or alter the behaviors, acts, and style of others.” She notes that there is “an unspoken and unwritten acknowledgment that one who follows an influencer believes in that influencer’s vision.” Typ-

“An influencer is one that has garnered a reputation and subsequently a following on social media platforms for the content that they post.”

Like Kerrigan, LaHaye notes that most influencers have a specialty, such as fashion, gaming, or technology. A common criterion for influencers is to have at least 10,000 followers on at least one social platform, he says, and to consistently generate a minimum of 1,000 engagements (likes, comments, reposts, shares, etc.) for each piece of content.

“We used to use the term ‘influencer’ mainly in the context of traditional media, and PR was primarily focused on convincing them to cover a particular company or news item. Social media has changed all that,” says Annemaria Nicholson, the North American director of content marketing and social media at Cision, a media intelligence company. “With Instagram, YouTube, and even blogs, many people effectively control or even own a means of distributing content. Influencers can come in many different forms [and] each influencer has unique worth and value when it comes to inspiring his or her particular audience.”

“Each influencer has unique worth and value when it comes to inspiring his or her particular audience.”

At press time, 2017 figures were not yet available, but the enduring dominance of social media—with Instagram alone boasting 800 million monthly active users as of September—would seem to suggest that digital influencers will continue to have a special place in marketing strategies for quite some time.

According to the same Forrester report, influencers fall under the umbrella of “word-of-mouth marketing,” which the report asserts also includes customer and employee advocacy. More specifically, the report defines influencers as “mainstream journalists, industry analysts, subject matter experts, independent bloggers, and certain social media celebrities who have influence in a specific topic or category and are not customers or employees of the brand.”

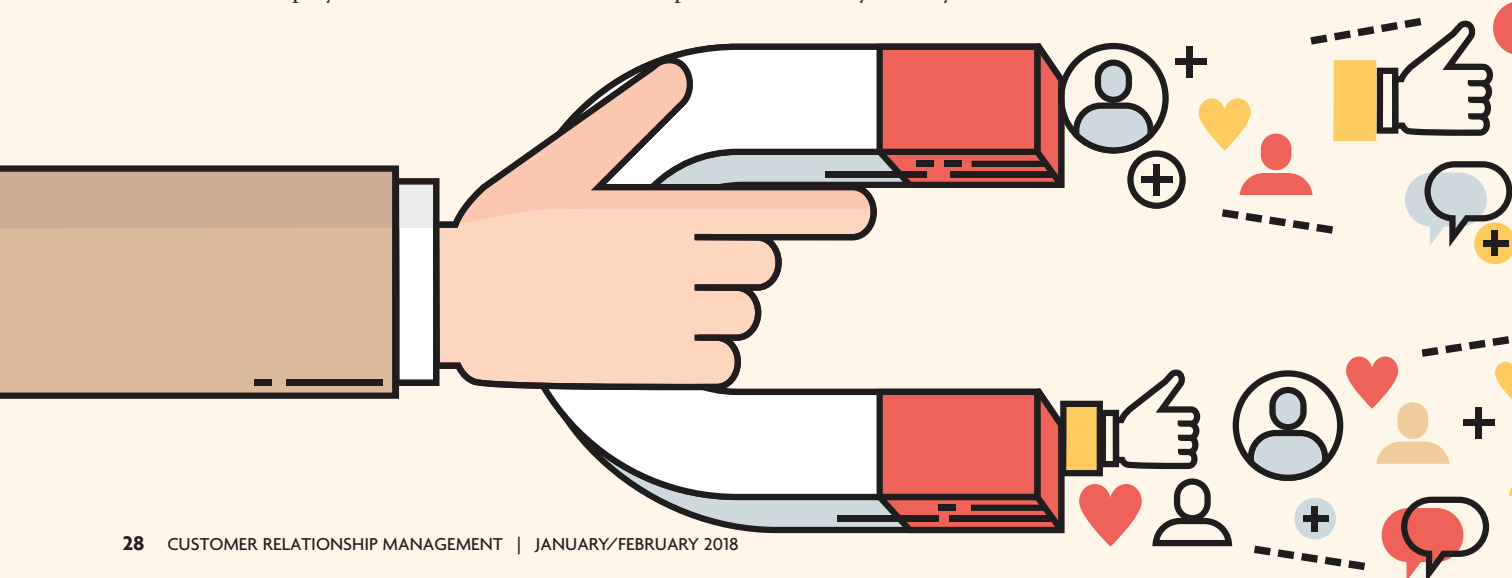
ically, influencers are categorized by the number of followers in their networks, she says, noting that a “micro-influencer” might have a reach of just a few thousand, while a “mega-influencer”—such as Selena Gomez who, with 128.3 million Instagram followers, is the most followed person on the platform—can command audiences of tens of millions.

There are influencers specific to nearly every industry, from fashion to food to electronics, Kerrigan says, adding that within each industry there are different types of influencers, ranging from members of the Kardashian-Jenner clan to celebrity bloggers like Perez Hilton to thought leaders like Tesla founder Elon Musk.

Felix LaHaye, cofounder of influencer marketing company Open Influence, defines the phenomenon fairly broadly:

THE VALUE OF INFLUENCERS

Experts agree that the trust between influencers and their audiences is invaluable to marketers. “Influencers are real people who have built a following over time and are trusted by their audiences. They are authentic,” says Holly Pavlika, senior vice president of marketing and content at Collective Bias, an influencer





marketing company. “They have worked hard to build relationships and place a priority on maintaining them through content that is in their unique voice. Because of this, influencer audiences are more apt to accept the product and service endorsement and act upon the call to action because of the existing trust.”

LaHaye agrees, saying that the key benefit of working with influencers is “using the strong and trusted connection they have with their audiences.” He notes that influencers “rise to prominence thanks to their ability to create relevant content” and “enjoy a special relationship with their followers.”

For these reasons, he asserts that when an influencer’s values align with a company’s, that company benefits from “strong organic engagement and validation.”

From another angle, experts point to a lack of trust in traditional marketing methods and the media in general as a reason for marketers to work with influencers. “Overall, there is a trust deficit in advertising. Most consumers no longer respond as positively to classic forms of marketing,” LaHaye says. “Therefore, by fostering positive collaborations with influencers, brands can reach their target audiences in their comfort zone, benefiting from their associations with these trusted figures.”

Nicholson notes that though “there’s nothing wrong with traditional advertising,” in many cases it is an unwanted interruption and suffers from an inherent

lack of trust among consumers because it has been manufactured by the company. This perceived lack of authenticity contrasts with word of mouth, which “is the best form of marketing,” she says, and influencer marketing “is a very powerful way to get word of mouth.”

Maria Pergolino, senior vice president of global marketing and sales development at Apttus, a provider of quote-to-

**Influencer marketing
“is a very powerful way
to get word of mouth.”**

cash software, agrees that voices outside the brand are more credible. “Often potential and current customers don’t want to hear promotional information from a brand, but instead want third-party perspectives about a product or industry,” she says. “Influencers provide this outside perspective.”

INCORPORATING INFLUENCERS

Experts point out several approaches marketers can take to finding and partnering with the best influencers for their particular companies. Jessica Thorpe, president at gen.video, a provider of an influencer marketing platform, says that companies first need to determine what influencer qualities will make a partnership with their brand feel genuine. She warns that “developing and managing a relationship with influencers is time-consuming and sometimes complicated work.” If organizations lack the resources to carry out an influencer program, they should consider partnering with an outside firm that already has the necessary relationships and technology.

Devika Rao, vice president of account services at O’Neill Communications, a marketing agency, breaks down the steps to choosing an influencer: First, identify influencers with expertise in topics relevant to your company; second, note which platforms the influencers use and how far their reach extends; third, review

their work, voice, and presence to determine if it aligns with your brand voice, message, and goals.

Rao notes that establishing relationships with influencers is “similar to how you would meet with any member of the media.” Marketers need to “take time to really get to know these influencers—who they are and what their work is,” she says, as well as “pitch them the right information that is aligned with their brand and platforms.”

Nicholson offers a different approach. “When identifying influencers for a campaign, I like to flip the model. First I look to my audience. Who is inspiring them? What do they care about? How can I inspire and educate them and provide value to them? Then I work backwards, identifying the influencers that matter most to my particular audience,” she says.

SIZE MATTERS, MINIMALLY

The size of an influencer’s audience is not the only factor marketers should take into consideration, experts caution. According to Nicholson, marketers also need to look at the kinds of comments influencers get on their posts to ascertain the tone and quality of that engagement—with an eye on whether the activity is from bots or real people, for one thing, but also whether influencers are creating content that is valuable to their audience and aligns with the values their companies represent.

To illustrate this point, Pergolino compares a major rock star to a local band. While the major rock star might boast a wider impact, the local band could “specialize in a specific type of music that creates a following. The specialty, accessibility, and proximity of the local band create influence for them that is different and potentially more impactful to a smaller group of people,” she says.

While the major rock star “can tell people [that] he loves a product and his fans might purchase that product based on the recommendation,” Pergolino continues, the local band’s influence could be harnessed to promote a local product and “create more influence in that regional market.”





For this reason, she says, it is “important to pay attention to all of your potential influencers, not just the biggest names in the space.”

Once audience size preferences have been addressed, the nature of the relationship between the influencer and the company needs to be determined. Nicholson has identified two very unique types of relationships between companies and their influencers: paid and unpaid. The paid relationship, she says, involves a “formal partnership” where the company pays influencers to include


to consumers. [It is] how can you tap into the challenges or things they care about?” Nicholson says. “Influencers may represent someone their followers aspire to be like, or simply someone they like to learn from. The content you create with an influencer needs to be focused on providing the value the influencer’s audience has come to expect. This is not about just hijacking someone’s social media channel to serve your own ends as a marketer. Just like brands have always pursued earned media opportunities through PR, it’s about making yourself

numbers,” Pavlika says. “Influencers work independently, so a brand must trust them, keep instructions simplified, bring any legal concerns to their attention at the beginning of the process, and provide plenty of time for influencers to produce content,” she continues. “Laying the groundwork for a relationship based on trust is key to long-term success.”

Pergolino agrees. “Marketers need to understand [that] they cannot directly control the narrative of the conversation when influencers are involved. This means that they have to be OK with campaigns driving an overall result, like new business, and not [expect] specific actions, like using specific phrasing in a promotion.”

Regardless of how companies choose to work with influencers, few would dispute they have become essential to today’s marketing. “The impact of influencers should not be taken lightly in today’s marketing world,” Rao says. “I absolutely love working with influencers. They are approachable, accessible, and it is truly a collaborative experience.”

Pavlika agrees and adds that influencers have a place throughout the customer journey. “All too often companies don’t take advantage of utilizing influencers and their content in different stages of the customer journey,” she says. “Content plays a role all along the decision process, from awareness to purchase, as shoppers need content to make decisions. Marketers need to add influencer content to the mix and incorporate it into all aspects of cultivating customer relationships.”

“Influencers are a major part of marketing efforts in today’s world. A new or indie brand can gain exposure and clout quickly by working with influencers within their industry,” Kerrigan says. “In a world in which Millennials believe more in Justin Bieber’s sense of fashion than a \$50,000 Macy’s advertisement, brands and companies must harness the power of major influencers to spread the word of mouth.” 

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“Brands should let influencers manage their own interactions and not assign expectations simply based on reach numbers.”

+



the company’s products in their content, for example. The unpaid relationship, by contrast, would involve offering an influencer early access to a product, service, or experience so that he will be motivated to include the company in his content.

Nicholson notes that some influencers are trying to support themselves through content creation and will want financial compensation; for others, being the first to try new products, services, and experiences for free might be enough of an incentive.

In either case, it is essential for the company to address the transparency of the relationship. This includes discussing how influencers will label sponsored posts and disclose the nature of their work with the company. “Influencers need to be authentic, and brands need to be honest, too. Otherwise consumers will lose trust,” Nicholson says.

Once these details have been worked out, marketers can focus on how they want to harness the influencer’s reach. According to Nicholson, the best way is to “think like an influencer yourself.”

“It’s not your products, your services, or your message that is most important

a part of a conversation where your audience already wants to be.”

And companies are discovering new ways to use influencer content for marketing purposes “all the time,” according to Nicholson. One example might be having an influencer speak at a company event that gets covered by traditional media outlets. In this scenario, Nicholson asserts, the influencer “can carry more weight” because she can be seen as an independent expert with no direct company ties.

Some companies have also worked directly with influencers to co-develop products and services, such as recipes based on an ingredient the company produces or video content that “inspires rather than sells.”

Experts caution that companies working with influencers should not be overly involved in content creation. According to Collective Bias’s Pavlika, the key to success in working with influencers is to “allow them to remain authentic by letting them tell their stories and engage with their followers in their own way.”

“Brands should let influencers manage their own interactions and not assign expectations simply based on reach



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Include Sales in Customer Intelligence

Marketing and service teams know where customers came from, but do your salespeople?

BY MARY SHACKLETT





Last year, when I tried to change a rental car reservation at an airport counter, agents at the big-name car rental company told me it was impossible—since I had booked the car online, any changes would have to be done through the website. The sales agents at the counter were unaware of my history of renting from the company online because they didn't have access to the online system. This complicated the sales process so much that I stepped away to the next counter, where a competitor was better equipped to accommodate me and ultimately got my business.

This is an all-too-common problem at many companies, where two different business units (one online and one physical) use two different systems that don't talk to one another. It prevents sales reps from fully knowing all they can about their customers, their preferences, and how best to pitch to them. As a result, most sales reps are not as aware as they could be—and some would argue, should be—about where their customers came from and the steps they took along the journey to get there.

“In general, salespeople lack full understanding of customers, how the solutions sold would actually be used by customers, and the impact the solution would make on the customer's life,” says Lior Arussy, founder, president,



and CEO of Strativity Group, a customer research and strategic planning company. “They are biased and view the world from their own perspective and sales targets.”

This is understandable, Arussy points out, because often “salespeople’s awareness varies widely based on the length of the sales cycle and the size of the deal. Longer, larger deals command more investment of time to understand customers, while shorter ones do not.”

Another problem encountered frequently in the sales cycle is that while analytics are being used, most of the time the purpose is to help sales reps sell more, not to help them understand and better serve their customers, according to Arussy.

MAKING THE TIME

Salespeople are also under constant pressure, especially if they are selling commodity items with short lead times from start to close. In this environment, they must continuously sell. They don’t have time to learn new systems or to consider how analytics could help them.

This is where the marketing department can step in.

“If you have a sales force that has a marketing arm that is responsible for lead gathering and qualification, tracking where the leads are sourced from, how they score as potential buyers, and so on, the sales force itself isn’t going to care much about the source of the lead. They will figure it’s marketing’s responsibility, but they’ll go with it,” says Tiffani Bova, global growth and innovation evangelist at Salesforce.com. “They figure that marketing will track each customer, from initial contact and sale through service and delivery, and that marketing can use the analytics.”

On the flip side, if a salesperson doesn’t have channel tracking enablement from marketing, the process can become more difficult.

“I still believe that most salespeople have not harnessed the power and the intelligence of CRM and marketing intelligence in general, not to mention knowledge about customer behaviors

and profiles on different selling channels,” Bova says.

But the real question is whether sales reps are actively using information about their customers—such as their preferred communications channels—to best direct sales pitches to them. “The smart ones are,” Arussy says. “Those who value their time will use tools to ensure they are not spreading their efforts too widely and are targeting [customers with] the highest chances of success.”

But the truth is that many are not. “Very often, if you didn’t start your career with those tools, you are less likely to start with them now or to fully utilize their capacity,” Arussy laments. “It’s the success inertia that makes those salespeople feel they already have a good formula for success.”

“Ultimately, you want to maximize sales while minimizing time wasted.”

Bova agrees that highly successful sales reps don’t see much of a reason to change their methods and the tools they use, and their companies often don’t want to see them change too much either.

Meanwhile, many companies (and their sales managers) are also entrenched in the old ways of evaluating sales success.

The competitive nature of the sales job in general is also a factor. “Salespeople have to compete against other salespeople in competitor companies, but also against salespeople in their own companies,” Bova explains. “They compete

on quota, which is measurable, and their managers might also measure them on the number of telephone or email contacts they make in a day.”

In that competitive climate, better customer tracking, better customer journey mapping, and more knowledge about how customers engage with companies all have great potential to improve sales performance, experts agree.

Additionally, companies can use any number of means to evaluate customer channels—such as which channel best facilitates closing a sale, which generates the highest basket price, and which produces the least amount of churn.

“Ultimately, you want to maximize sales while minimizing time wasted,” Arussy states. “This is the pinnacle of the effective salesperson. By knowing where to focus—who is most likely to buy, what they are most likely to buy, and when—you can manage your time to become most effective in your sales efforts. It eliminates a lot of the scenarios where we spend time on the wrong customer or the wrong timing.”

Sales channel intelligence and CRM systems can also help sales reps get the best returns from the sales contacts they make.

“Here’s how sales channel and also CRM intelligence can help you. Your manager tells you to contact at least 100 people per day via email. You also have a sales quota to meet. By using CRM and sales channel intelligence systems, it is possible for you to deduce who is the most likely to buy from you based on what the analytics tell you. These are the top prospects that you focus on,” Bova says. “By adding artificial intelligence and analytics to your sales efforts, this might enable you to reach a sales quota after calling the first 20 customers instead of the full 100,” she continues.

EVALUATING THE VALUE

However, for sales processes to work optimally, companies must also have sales reps “who are conscious of the value that is locked in the intelligence they are getting and who care about it.”



This is where many salespeople will object, especially if they have their own tried-and-true methods. Veteran salespeople are usually stuck in their ways. They don't think they need new tools and often ignore them.

Many of these same sales reps also value the personal rapport and intimacy they have built up with their customers over time. They don't want to see impersonal technologies erode that. They say things like "My clients do not work that way" or "I know them better than anyone else" whenever any improvement to the sales process is suggested.

"Because these salespeople deliver results despite not using the new tools, the organization leaves them alone and loses the opportunity for effectiveness and efficiency," Arussy warns.

Another risk is that technology "will shift sales from relationship building to transaction facilitation," Arussy says. "Because if the only time you speak to customers is when they are ready to buy, you will miss other opportunities and customers will perceive your efforts as very self-centric. It's the fast track to becoming a commodity and selling on price."

Arussy adds that one thing that can help speed up adoption is embedding all customer-related information into a single application that is easy for sales reps to use.

"We can't waste our team's time in going to different places to get the data," he says. "An alert-based CRM system should feed the information proactively to salespeople on a weekly or daily basis and ensure that they plan their time accordingly. It should also track if the salesperson followed the guidelines or opted to do things less efficiently."

Such a system can also measure the number of effective contacts per day as opposed to the number of cold calls made per day.

DEFYING AGE

A sales rep's age might very well play a role in whether barriers to new technology adoption fall or remain standing.

"If you've been selling for 15 or 20 years, you have a selling process that

you're comfortable with and that has worked for you. As a result, you are more likely to be resistant to a new methodology," Bova says. "But if you're relatively new in sales, you are more open to new technology. If you hear a tool is smarter and faster, you'll want to explore it."

"We are not talking about replacing people with artificial intelligence and automation."

For this reason, Bova recommends that companies start new technology programs with younger sales employees who are just starting their careers.

There is also a general sense of fatigue that many sales reps, especially the older, more seasoned ones, experience that can make them reluctant to try new technology or sales approaches.

"We can get very burnt out telling the same story to prospect after prospect," says Mark J. Ryan, a personal coach and therapist who advises clients in the fields of personal development, success, and small-business product generation. "When burnout happens, there isn't much energy left to try something new."

Bova points out that when sales reps are first presented with sales intelligence tools and automation that can make them smarter and more effective, they can often experience what she calls "a sense of fatigue in their psyche."

In some cases, the objections go even deeper. "We are not talking about replacing people with artificial

intelligence and automation. We are talking about enabling them so they can be smarter about how they use their time," Bova says.

There is also an IT cost associated with sales channel tracking that is based on the number of data sources that need to be unified. "For large companies, it can be a pretty significant investment," Arussy says.


At the same time, though, there are plenty of low-cost, low-effort ways companies can improve customer channel awareness.

"Use social media to learn more about your customers," Arussy advises. "Start with LinkedIn to get to know your customers and build up from there."

Customers today live very public lives; they share everything via Facebook, Instagram, and Twitter, he says. "Ignoring their shared information might actually be an insult to them. They expect you to do your homework in this world of extreme transparency."

Finally, before introducing sales intelligence, consider segmenting your sales reps. "We often break down salespeople into three different categories," Bova explains. Group C is the least effective salespeople. Group A, which comprises about 14 percent to 17 percent of sellers, consists of the top salespeople, who can be difficult to manage because it is hard to argue with success. Then there is Group B, the mid-level performers who make up 55 percent to 65 percent of the sales force. This middle group is where you want to introduce sales intelligence that indicates the channels from which customers are buying.

"The common wisdom is that if you can move the sales performance of this group by 2 percent to 5 percent, you will experience significant revenue growth," Bova says.

And that's not a bad place for any customer journey to wind up. 

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REAL ROI

Slice Serves Up Automated Workflows with Kustomer

A technology provider for local pizzerias streamlines support operations with ticketing and communication software

Headquartered in New York City, with offices in Macedonia, Slice provides a digital platform for local pizzerias and Italian restaurants in 2,000 American cities. The company's goal is to provide independent pizza shops with online ordering, supply chain and customer analytics, and email marketing tools so they can compete with chains, says Zach Goldstein, product manager at Slice.

Founded in 2011, Slice was ready to expand its operations by late 2016. But first it had to alter its approach to customer support tickets. The nine operations teams, located in Macedonia, were using homegrown systems to manually review each incoming order and customer complaint. The technology didn't have a notification system, so users had to use messaging system Slack to alert team members to the issues that needed attention. "Way more often than I'm comfortable admitting, we had our order processing reps and customer support reps reaching out to the customers placing orders and shops receiving orders," Goldstein recalls.

To gain insight into team member performance, the company built an administrative tool to create tickets that agents could be prompted to view, which solved an initial challenge, as it reduced the number of communications required to complete each task. But the tool couldn't track the tickets; the system enabled users to store details of each case only in a single cell within an SQL table.

The captured information was difficult to analyze and draw conclusions from. As a result, the teams weren't learning anything useful about what reps were doing to support customers.

Goldstein began shopping for a more robust ticketing and communication solution in late 2016. "One of the things that makes us unique is that we communicate internally and externally," Goldstein says, with some team members communicating only with colleagues and others communicating with colleagues and customers. "We were looking for a tool that was able to support the dual-sided marketplace and give us flexibility to both service our internal and external communicators and customers."

Slice settled on Kustomer, whose technology integrates data from events such as transactions and conversations that occur across channels, including text and email, into an actionable platform.

The technology was deployed in December 2016, as data from Slice's homegrown system was imported and matched with Kustomer's APIs. Goldstein reviewed the support teams' various responsibilities and corresponding functions to figure out how to optimize workflows. "We realized we could use Kustomer to automate things that were formerly manual," he says.

According to Goldstein, Slice automated at least 100 workflows using Kustomer's Smart Workflows. "We were trying to create a self-cleaning oven, so that when

certain issues or tickets came up, they are auto-transferred to the [appropriate] team, and the team wouldn't have to think about where it goes next," he says.

For instance, if a customer places an order with instructions to add extra chicken, the shop might charge extra for it, but the price difference might not be listed on the menu. With Kustomer, a rep from the order processing team can click a button to transfer the ticket to customer support, enter the reason for the transfer, and create a ticket for the support team, who can then input details on what they've done to fix the problem, adjust the menu, and categorize the case.

The company also has better insight into various channels' staffing requirements at certain times of the day. For instance, using Kustomer's Timeline, the company can see the historical volumes for chat, SMS, and Facebook Messenger to see how staffing needs change on an hourly basis. "That's been a major help in terms of informing our staffing and making it a lot more painless than it would be otherwise," says Rich Lorenzo, Slice's customer experience manager.

"We're looking at 2018 planning and talking about fairly major changes to our process flows and even how our teams are organized, and the thought about how Kustomer is going to accommodate this is never something I'm concerned about," Lorenzo says. "The flexibility is such that we can make it do whatever we possibly ever need it to do." —Oren Smilansky



the payoff

SINCE IMPLEMENTING KUSTOMER'S SUPPORT PLATFORM, SLICE HAS BEEN ABLE TO:

- automate more than **100** workflows, a significant time saver;
- improve cross-team communication and collaboration; and
- better monitor changing staffing needs across channels, optimizing employee productivity.



Campus Protein Supplements Its Marketing with Nosto

The vitamin vendor builds customer trust using retail personalization technology

Campus Protein, launched eight years ago at Indiana University, sells vitamins and supplements to college students at affordable prices—“pretty much everything you would find in your local store but for about half the price, and then we also have our own private line of supplements,” says CEO Russell Saks. Saks started the business as a student and saw it take off after the company entered and won a *Shark Tank*-style competition funded by an Indiana University alum.

“It wasn’t a ton of money but we used it pretty well and it got us to the point that we’re at today,” he says. “Today we’re at a little over 300 college campuses and we have about 1,500 campus reps.”

The supplements industry is challenging for a number of reasons, Saks says—it’s very competitive, for one thing, with a range of products competing in similar categories. Even more critical is the issue of customer trust. “These products are ingestible; it’s the type of product that

you’re putting in your body. You want to be able to trust those products; you want to be able to trust the source that you’re buying them from and the ingredients that are involved, and you want to make sure that those products are really best for you and your specific goals.”

“What Nosto is able to do is help predict which products customers are interested in before they even realize it.”

Saks and his team wanted a way to determine which products were best for their customers, and personalizing the operation seemed to be the answer. “We were originally considering building out a quiz and saying OK, it would be cool for customers to say, ‘I’m male or female, here’s my age, here’s how often I work out, [and] here’s how advanced I am as a gym-goer or supplement user,’” he says. “That was our original plan until we were introduced to Nosto.”

An online retail personalization company, Nosto uses an algorithm that, the firm says, can analyze customer behavior and deliver automated, personalized recommendations in real time; its solution integrates with more than 100 e-commerce platforms. “What Nosto is

able to do is help predict which products customers are interested in before they even realize it. It’s an incredible piece of technology not only from an ROI standpoint but also from a customer experience standpoint,” Saks says.

Nosto has delivered a number of significant results for Campus Protein. A personalized widget added to Campus Protein’s abandoned cart emails, which uses individual customer behavior to display items that are most likely to convert, has generated a 22 percent click-through rate. Additionally, Campus Protein has seen 15 percent conversion rates from customers engaging with personalized shopping cart recommendations, 10 percent conversion rates on recently viewed item recommendations, and a 9 percent click-through rate on its most popular items page, which captures real-time searches from customers.

Saks praises the flexibility of Nosto’s technology. “Nosto has a true algorithm that we can really set up in a bunch of different ways; we can really set the complexity of it. [For example], we can see typically this type of customer is browsing these types of websites, [so] here’s a product that we think they’re most interested in. Or we can use it in a more basic way and say, ‘OK, once customers have products A, B, and C in their carts, typically other customers will buy products D, E, and F,’ and we can cross-sell in that way.”

“There’s a bunch of different use cases, and the software ranges from a super-basic application all the way to something really intense, depending on the use case.” —Sam Del Rowe

the payoff

SINCE IMPLEMENTING NOSTO’S RETAIL PERSONALIZATION SOLUTION, CAMPUS PROTEIN HAS SEEN THE FOLLOWING RESULTS:

- A 22 percent click-through rate with the personalized widget added to its abandoned cart emails;
- a 15 percent conversion rate with personalized shopping cart recommendations;
- a 10 percent conversion rate with recently viewed item recommendations; and
- a 9 percent click-through rate on its most popular items page.

Speech Analytics Enters Its Next Act: Maturity

Speech and text analytics have become indispensable to the customer journey, and increased adoption and a replacement cycle are the next stage

THE SPEECH analytics market continues on its remarkable journey as it matures, enters middle age, and confronts a variety of new challenges. The primary issues are these: Speech analytics is not yet considered a “must-have” application; analytics-enabled quality assurance (AQA) has not caught on; real-time speech analytics has a limited number of use cases; and text analytics continues to struggle to be noticed.

Each of these market challenges represents substantial opportunity for vendors and end users. Companies that are serious about using speech analytics and treat it as an enterprise-level analytics solution, support it with highly trained business intelligence analysts, and build a change management program to apply its findings are realizing great benefits.

Unfortunately, there are also many hundreds of organizations that are not yet doing so. This typically happens when a company uses a basic and limited speech analytics application that performs only keyword searches, or a company has not made the investment required to build a true enterprise-level speech analytics program to apply findings on a timely basis.

Speech analytics has reached maturity after 14 years in the commercial market. Currently, there are two types of speech analytics solutions. The first group consists of a small number of feature-rich solutions. These sophisticated applications are evolving into business intelligence platforms that use speech- and text-based findings to provide enterprise-level data. The second group of solutions is much larger and includes many that have more rudimentary functionality. They concentrate on identifying keywords and even some key phrases and might come with charts or dashboards to



help users find some basic word and phrase patterns. DMG expects this high-value IT sector to continue to evolve and transform into increasingly valuable solutions.

THE NEXT ACT FOR SPEECH ANALYTICS

The upside for speech analytics remains great. While adoption has been strong, the addressable market is still large, and there are thousands of contact centers that have not yet adopted speech analytics. Given the maturity of the market, it's time for a replacement cycle; there is great opportunity for speech analytics vendors to replace existing solutions, particularly now that the current generation of solutions is available in the cloud and addresses both speech- and text-based interactions.

The technical innovation that is coming from leading providers of speech analytics is compelling, and there are substantial differences between current and older applications. From the market's beginning, these solutions held great potential for companies, but their contributions will increase as their capabilities are incorporated into other applications. This is absolutely the case for customer journey analytics. Speech and text analytics are necessary to understand many aspects of the customer journey and are a great way to get started in building a

IT IS COMMON TO FIND SPEECH ANALYTICS AS A FULLY INTEGRATED MODULE OF SALES SOLUTIONS AND MARKETING AUTOMATION PLATFORMS.

voice-of-the-customer program. Interaction analytics, another name for speech and text analytics, does not address all touch points in the customer journey, but among its many uses, this tool can provide context and great insights about customer needs and wants through many communications channels.

Speech analytics technology, specifically keyword search and transcription, is being incorporated into a variety of third-party applications, creating a very large opportunity for the engine providers. It is common to find speech analytics as a fully integrated module of sales solutions and marketing automation platforms. Speech analytics engines are a standard component of e-discovery tools and are finding their way into enterprise business intelligence solutions.

A few speech analytics vendors have created packages to address specific business opportunities like customer churn identification, improving sales/collections, first-contact resolution, and other targeted uses. This is a step in the right direction, but such targeted uses are primarily intended to give users a lexicon/library of search terms and phrases to help them get started. The next step is for speech analytics to enter the world of data science and create algorithms to identify a variety of enterprise issues. DMG expects to see these types of capabilities emerge, although they won't necessarily come from the speech analytics vendors. The point is that there is a lot more that can be done with speech and text analytics, and this sector presents substantial opportunity for both vendors and end users.

ANALYTICS-ENABLED QUALITY ASSURANCE

Analytics-enabled quality assurance solutions hold great promise for enterprises, agents, and customers. AQA solutions automate contact center quality assurance/quality management (QA/QM), a process that has not changed substantially in the past 30 years. QA is necessary for many reasons. Enterprises invest a significant amount of resources to monitor and evaluate how well their contact center agents handle interactions and adhere to internal policies and procedures. It's essential to monitor what agents are doing and for them to know that there is always a chance that management is watching. In addition, with many contact centers, QA is the only way to gain an understanding of why people are contacting them. And QA is often the most effective method for providing timely coaching to agents to improve service quality and increase agent satisfaction and retention.

The current QA process is people-intensive, which is expensive, inherently subjective, and, with most


companies, statistically irrelevant because too few interactions are evaluated. While speech analytics—the underlying technology in an AQA program—cannot understand everything agents say or write and does require some human intervention, it can deliver statistically relevant findings and is much more likely to identify issues than the current QA approach. Despite these benefits, few enterprises have adopted AQA. This is because AQA solutions are complex and considered ineffective and untrustworthy. But with the introduction of machine learning, DMG believes these solutions will improve enough that companies will feel comfortable using them.

FEW IF ANY VENDORS
OFFER REAL AI, ALTHOUGH
INTERACTION ANALYTICS
IN PARTICULAR WILL
BENEFIT GREATLY FROM IT.

AI AND INTERACTION ANALYTICS

Artificial intelligence (AI) is the buzziest term in the technology arena. Most IT vendors in various sectors—speech and text analytics vendors among them—are claiming to provide AI-enabled solutions. But few if any vendors offer real AI, although interaction analytics in particular will benefit greatly from it. Imagine a speech or text analytics solution that identifies and quantifies the impact of a new trend without human intervention. Machine learning is starting to be used to accomplish this task, and while these capabilities currently require human intervention, DMG expects a new round of investments in AI that will make significant contributions and improvements in speech and text analytics solutions in the next two to three years.

FINAL THOUGHTS

As always, potential customers should be aware that all speech and text analytics solutions are not equal and require careful evaluation to ensure they have the desired features and capabilities. Speech and text analytics solutions provide quantifiable benefits to companies that invest in the right solutions as well as the resources and best practices to build an effective program. These solutions are highly valuable on a stand-alone basis, and their benefits increase as the technology and findings are incorporated into third-party applications and processes. 

Donna Fluss is president of DMG Consulting. For more than two decades she has helped emerging and established companies develop and deliver outstanding customer experiences. A recognized visionary author and speaker, Fluss drives strategic transformation and innovation throughout the service industry. She provides strategic and practical counsel for enterprises, solution providers, and the investment community.



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Pint of View

The Internot of Things

Linking machine to machine, separating hype from hope

[Editor's note: This column originally appeared in our February 2017 issue.]

BY NOW you've no doubt heard all, or perhaps too much, about the Internet of Things, or the IoT for short. The ability to connect sensors and devices to one another via the cloud without human intervention is a neat idea, and I'm sure it will pave the way for the inevitable fall of our society to new robot overlords. The state of the world being what it is, this might not be so bad.

Even so, I've been hesitant to delve too deeply into the IoT as a topic of exploration until recently. Too many people name-check it into conversations where it doesn't seem to belong—mostly vendors who want to be heard talking about the shiny new thing—and that always makes me suspicious.

The good news is that companies seeking to adopt IoT technology appear to be doing it for the right reasons. A recent Ovum survey revealed that the top three drivers of IoT adoption were improving customer engagement and experiences, improving operational efficiency, and strategic decision making based on actionable insights. That third one reads like corporate double-talk, but it's legit; boiled down, it's just another way of talking about Big Data, which the IoT can deliver via linked sensors and devices.

If the IoT takes off the way people want it to, possibilities abound for micro-targeted services, more accurate data collection in a plethora of applications, complex workflows triggered without people, better device reliability through failure prevention, you name it. Creative designers can do some sci-fi stuff with machine-to-machine communication.

But there are downsides to an IoT world. First off, businesses face a number of adoption hurdles that must be overcome before any of this is worth it. The biggest one is privacy and security. We've seen that the IoT is hackable—the mass Internet outages of October 2016 were staged from mobile and IoT devices. Privacy is an issue when you're carrying around surveillance equipment you can't see or control. We've thought about how much of ourselves we give away with selfies,


check-ins, and location-based services, but those are mostly conscious choices. The IoT is supposed to be unobtrusive, so you could forget what you're broadcasting. It's the potential dark side—the id, if you will—of the IoT. Don't be an id-IoT.

The second-biggest hurdle is infrastructure—as in, we simply don't have it yet. Rollouts of IoT services might stall because not enough devices are using them; devices might not catch on because there's not enough for them to do. It's the classic problem with any technology that isn't self-contained. Then again, TV and the Internet caught on pretty fast, so maybe this isn't a big deal.

But what about bandwidth? If predictions hold, 20 billion to 30 billion IoT devices will be connected by 2020. Each one uses some amount of network capacity. Even if each amount is tiny, 20 billion is an awful lot of anything, tiny or not. And they're always on and communicating, even if only to say, "Nothing happening here." You think data traffic is bad now? Wait.

Here's a hidden problem with the IoT: More people have heard of it now, but not enough understand it yet. It's easy to provide a definition to the curious, but then they follow up and ask, "Yes, but what is it? What does it do?" Those answers aren't as easy.

Most of what is being labeled as the IoT is really just the next generation of home automation, something that's been around in various forms for decades. It's not a big deal to control your lights and music from your phone. Using a tablet as a remote control is boring. Show me a system that adjusts the lights and music intelligently when you walk into a room, based on time of day, preset preferences, what you were doing last—that's a bit more impressive. It still amounts to fancy ways of using consumer electronics, but it's something.

I look forward to a future where the Internet of Things is itself a thing. Time marches on, technology can make our lives better, and so on. But the future will get here on its own schedule, and there will be holes in this net for a long time to come. 

Marshall Lager is a senior analyst at Ovum, covering customer engagement. He hasn't figured out a new way to be clever at the end of articles yet. Send suggestions to marshall.lager@ovum.com or www.twitter.com/Lager.



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