

CRM

CUSTOMER RELATIONSHIP MANAGEMENT

CRM LOOKS FOR ITS LINK ON THE BLOCKCHAIN

Largely used for financial transactions, blockchain technology is finding its way into front- and back-office applications

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- > With Interactive Marketing, Digital Outreach Becomes Bidirectional
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Don't Try to Block the Blockchain

Amazon has been at the forefront of nearly every customer service innovation since its founding in 1994. The online retail behemoth stretched the boundaries a bit more with its recent launch of special deliveries to car trunks.

Amazon in mid-April announced that delivery workers would now be able to place packages in the trunks of cars of Amazon Prime members in 37 cities if they own GM cars (Chevy, Buick, GMC, and Cadillac) with OnStar accounts or Volvo cars with Volvo On Call accounts. That, to me, sounds like a data disaster just waiting to happen and a potential gold mine for criminals just waiting to hack into Amazon's systems to unlock the cars of unsuspecting mothers whose only concern is making sure the bulk package of their baby's favorite brand of mashed sweet potatoes is delivered quickly.

I'd really be surprised if a company like Amazon hadn't already thought through the data security implications and taken steps to safeguard such valuable information. Amazon has, after all, invested heavily in blockchain technology, and in late April, its Amazon Web Services unit even launched blockchain templates to help developers create projects based on blockchain technology.

So what exactly is the blockchain? This month's cover story, "CRM Looks for Its Link on the Blockchain" (page 26), by writer Paul Korzeniowski, explains it well.

As noted in the piece, with blockchain technology, data is stored in blocks that are linked together and protected by a special form of cryptography that makes it nearly impossible for unauthorized people to access and alter the data.

The article goes on to explain that blockchain is fundamentally a way to manage data, and, as we all know, data is the driving force behind any CRM application.

Blockchain, when used to its full potential, will be able to fix many things that are wrong with CRM today. For CRM, the technology offers greater security, flexibility, and consistency of data; new methods of recognizing and rewarding consumer loyalty; greater transparency in marketing and advertising; and smarter contracting, among other benefits. The

article also points out that widespread blockchain adoption in CRM is still a few years away.

But just because the technology hasn't garnered mainstream adoption just yet is no reason to do nothing about it. Companies really need to start thinking about blockchain and laying the foundation for it within their organizations.

The first step is to get rid of data silos. And this goes very far beyond the basic departmental walls that companies have put up over the years.

In essence, blockchain is formulated on a decentralized ledger that is not owned by any specific party—or even a single company—but instead is shared and controlled together by all participants. For companies, that means that data is shared not only among departments internally; authorized suppliers, business partners, and customers can all access and interact with the information as well.

That creates a fundamental challenge—we all know how hard it can be to get just one customer's and one supplier's accounting systems to trust one another and interface seamlessly. Now try to scale this process to many customers and suppliers. And if you really want to add some intricacy, competing companies within the same industries could theoretically share the same blockchains, so rival companies would have to work together to resolve larger issues like software and hardware integrations and interoperability, proper permissions and authentication, industry standards, creating and fostering the growth of development ecosystems, and a lot more.

These aren't problems that need to be solved right away, but they can't be ignored either. "After all, expectations are that in the coming months and years, the missing holes will be filled, so organizations will be able to build, deploy, manage, and secure next-generation blockchain CRM applications in due time," the article concludes.

Once that happens, say five to 10 years down the line, the blockchain won't even be mentioned anymore. It will be like the internet; you'll just assume it will always be there and functioning normally. It will become part of the fabric of everyday business.

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COMPANIES REALLY
NEED TO START
THINKING ABOUT
BLOCKCHAIN AND
LAYING THE FOUNDATION
FOR IT WITHIN THEIR
ORGANIZATIONS.



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ADRIAN SPEYER, HEAD OF COMMUNITY, VANILLA FORUM

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To Get the Most from Your CRM, Pair It with Process

Strong CRM adoption is good, but not enough; you also need a formal, dynamic sales process

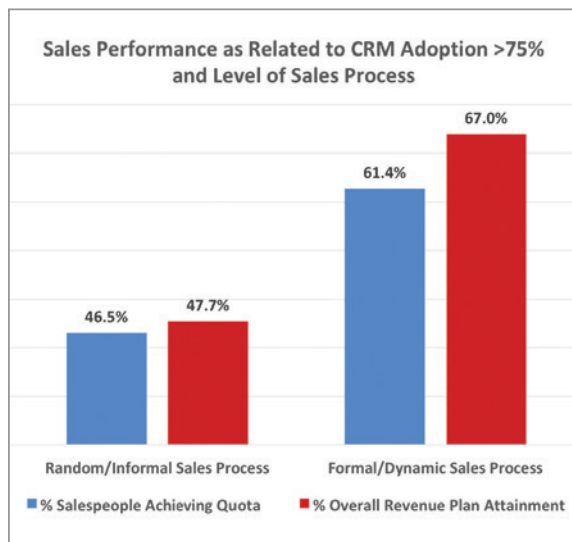
AMONG companies that have fully implemented CRM systems, the software-as-a-service usage model has emerged as the option of choice for the clear majority of them. With that licensing model comes subscription pricing, which means that every year or two, the opportunity arises for someone in those companies to question why they should sign up to continue using CRM. Helping to understand the ROI of CRM is one of the common calls I get from research clients. Let me share a few results that surfaced from some of CSO Insights' sales performance studies.

First, let's look at the case for whether to have a CRM system. While CRM usage is very high in the world of sales, we still see that about one in five firms have not implemented a solution. Our data makes it clear that electing not to use CRM is a poor choice. Over the past five years, we've seen that companies that use a CRM solution have from 8 percent to 11 percent more of their salespeople achieve quota than non-CRM-using firms, and the annual overall revenue plan attainment is 14 percent or more for the firms that use CRM.

So implementing a CRM solution does have a noticeable payoff. But a recent review of data collected as part of CSO Insights' "2018 Sales Operations Optimization" study uncovered another trend that sales organizations need to consider to optimize the ROI from their CRM systems.


For this analysis, I looked at firms that had reasonable CRM adoption, defined as more than 75 percent of their sales force actively making CRM part of their daily workflows. I then further segmented the data based on the kinds of sales processes those firms have adopted, splitting firms into two groups: those with a random or informal process versus those with a formal or dynamic process (dynamic defined as firms that have a formal process and the systems in place to track usage of the process).

In the chart, we see the difference in sales performance when both CRM adoption and the different approaches to sales process are taken into consideration. CSO Insights has long been advocates for focusing on both technology and process to help drive optimal sales performance. The numbers here show a bigger impact on selling success when firms use a formal/dynamic process than when they use a random/informal one.



The key to making analytics work is having your sales force all doing things in a consistent manner. When that happens, you can gain clearer insights into what aspects of your sales process are having a positive impact on sales effectiveness (so you can double down on those best practices) and which aspects are having a negative impact (so you can make proactive changes to those aspects).

Process rigor will become even more important over the next couple of years as the next generation of artificial intelligence tools become pervasive in the sales enablement space. Those solutions will drill deep into data from internal systems such as CRM, enterprise resource planning, marketing automation, customer service platforms, and so on, to provide a level of analysis never before available to sales organizations. Yet AI requires accurate, current, and consistent data to be most valuable. If we allow salespeople to do their own thing each day, and if usage of CRM is "optional," then AI will be seriously hampered in its ability to optimize sales performance.

So to help drive sales success now and set ourselves up for success going forward, we need to push for the adoption of both technology and process. Do that and the ROI from CRM will become evident to all. 

Jim Dickie is an independent research director and cofounder of CSO Insights, a Division of Miller Heiman Group that specializes in benchmarking CRM and sales enablement initiatives. He can be reached at jimdickie@icloud.com or at @jimdickie.

THE KEY TO MAKING ANALYTICS WORK IS HAVING YOUR SALES FORCE ALL DOING THINGS IN A CONSISTENT MANNER.

Customer Success Takes Engagement to the Next Level

When customers buy your product or service, the relationship is only beginning

AT A RECENT tech conference in Silicon Valley, an overheard remark from a participant captured the uncertainty around the concept of customer success: “Not sure I know many companies trying to achieve ‘customer failure!’”

It should come as no surprise that there is confusion over what is meant by “customer success” and how exactly to apply this new approach to your day-to-day business. Like other paradigm shifts, it will take time for customer success to become mainstream. Let’s take a brief look at these paradigm shifts.

The Product-Driven Paradigm: Until the 1990s, companies generally manufactured a product or provided a service and then promoted the heck out of it, telling customers that their offering was superior to competitors’ because of its outstanding features. This was the “build it and they will come” era. The failed Studebaker car is a classic example of the product-driven approach and illustrates how such an approach can crash and burn.

The Customer-Driven Paradigm: An important transition took place in the 1990s as best-in-class companies realized that product features alone cannot sustain differentiation over the long term since they get copied by competitors over time. Rather, these companies moved to a customer-driven approach, whereby companies began to manufacture products and provide services based on input received directly from their customers. The minivan, for instance, came out of this new customer-driven approach.

The New Customer Success Paradigm: The past few years have seen the customer-driven paradigm give way to the customer success-driven paradigm, brought on by subscription and pay-as-you-go business models. Under this approach, a company’s customer success manager is responsible for managing the relationship with customers, with the goal of making the customer as successful as possible with your product or service and thus improving the customer’s lifetime value. The main benefits include reducing/managing churn, driving increased contract value from existing customers, and improving customer experience and satisfaction. The ways to drive toward those benefits include health checks, quarterly business reviews, and proactive outreach. To continue the car

theme, Tesla is an example of customer success in action; by monitoring each owner’s driving habits through software and then upgrading that software to meet his unique driving habits, Tesla has shot past most carmakers in customer satisfaction ratings.




APPLYING CUSTOMER SUCCESS TO YOUR BUSINESS

Think about your business for a moment. When you sell your product or service to a customer, what success metrics do you have in place to determine how much value your customer is gaining from your product or service? How do you measure the perceived value of your product or service? Should you measure customer satisfaction? Repeat orders? Willingness of your customer to recommend you to a friend (Net Promoter Score)? Positive mentions on social media sites? Or do you go one step further and measure value by promising measurable results to your customers, e.g., your industrial machines will have less downtime if they use our synthetic industrial lubricant, your sales force will close more business if they apply our sale pipeline management software, etc.?

The key takeaways are these:

- Gone are the days when you can “push” your product or service onto a customer (product-driven).
- While it is critical to listen to the needs and wants of your customers and build these into your products and services, this alone will not assure the success of your product or service (customer-driven).
- Now more than ever is the time to focus on your customer’s success and ask yourself, “How is our product or service adding measurable value to our customers, and what metrics do we put into place to measure this value?”

No company is trying to achieve customer failure. But to survive the current paradigm shift, your company needs to focus on the value your customers receive from your offering. Determine what metrics you should use to measure your customer’s success. Create a customer success process and implementation plan. Then engage with your customers and make customer success happen. 

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ASK YOURSELF,
“HOW IS OUR
PRODUCT OR
SERVICE ADDING
MEASURABLE
VALUE TO OUR
CUSTOMERS?”

How to Build Digital Trust

Consumers have lost faith over data misuse. Here's how to restore it

WHILE CONSUMERS have happily shared personal data on social platforms in return for greater connectivity and shared experiences, recent news about data harvesting has caused alarm. Many companies that rely on consumer insight—essentially all of them—are rethinking how to build digital trust and make it sustainable.

According to Accenture Strategy's latest "Global Consumer Pulse Research"—a study of 25,000 consumers across 33 countries—the majority (92 percent) of U.S. consumers say it's extremely important that companies protect their personal information. Another 79 percent say it's frustrating to realize that some cannot be trusted to use it appropriately. Lack of trust is one of the biggest reasons consumers switch companies.

And with the recent General Data Protection Regulation (GDPR)—a regulation intended to strengthen data protection for EU citizens and let individuals decide which brands can use their personal data—good data stewardship is becoming critical to the success of every business globally.

THE IMPORTANCE OF INSIGHT

The ability to process personal data is critical to business in the digital age. Data-driven organizations rely on customer insights to help inform the development and design of products and services, the overall customer experience, and marketing strategy. From demographics to personal preferences, customer data allows companies to deliver hyper-relevant products, services, and experiences.

Some companies have built entire business models around the sale of anonymized personal data. Technology is creating opportunities for businesses to understand their customers on a deeper level and monetize this knowledge. Biometric, visual, genomic, and device data can allow ever-increasing degrees of personalization.

Personal data is a currency no business can afford to risk.

EARNING DIGITAL TRUST

To earn digital trust, leaders have to eliminate anything that jeopardizes it. Companies looking to future-proof their customer data supply should take these measures:

- **Deliver on their commitments.** Eighty-three percent of U.S. consumers say it's extremely frustrating when companies promise one thing but deliver another. An organization's commitment to delivering promised experiences and

meeting customers' expectations is paramount to earning trust. Successful companies understand their baseline level of trust and eliminate issues or offers that detract from the trust quotient. Otherwise they must reset their parameters.

- **Establish rigorous governance.** The only way trust can become sustainable is by establishing a rigorous process and a robust, cross-functional governance structure to continuously measure trust and hyper-relevant effectiveness—and acting on the findings.


- **Give customers full control over their data.**

We've said this before in these pages but it bears repeating. As customers demand greater control over how companies use their personal information, organizations must become more transparent. Customers must be given full access to, and control over, their data, which will demonstrate responsible stewardship and ethics. Furthermore, they must ensure the appropriate safeguards are in place to protect it.

Some companies may look to adjust their profit models and potentially charge for services (i.e., "pay for privacy") so customers are explicitly aware of the value being exchanged. That way companies could make money on direct interactions with customers as opposed to the derivatives of those interactions (i.e., selling insights or advertising). Or they could move from an information exchange relationship to a more classic view of understanding what customers need and having them pay for it.

More companies will undoubtedly assess their existing propositions and the economic viability of new models. But the question remains as to whether the underlying information and experience will become something that is merely expected, rather than something that customers would be willing to pay for.

THE PATH FORWARD

Digital trust is only sustainable when companies establish a rigorous process and governance structure. Most importantly, digital trust must be managed as the critical growth enabler it is. Companies will inevitably look to capture new categories of customer data—biometric, geolocation, even genomic data—in their drive for greater relevance. Customer concerns will inevitably rise, so it's critical that companies have strong data security and privacy measures in place, give customers full control over their data, and, crucially, are transparent with how they use it. 

Tom Jacobson is managing director of advanced customer strategy at Accenture Strategy.



LACK OF TRUST
IS ONE OF THE
BIGGEST REASONS
CONSUMERS
SWITCH COMPANIES.



Smart Customer Service That Wows Customers

What a fantastic collection of submissions we have in this month's installment of our Best Practices series. In the following pages, you will find a primer on the five essential parts of smart customer service and recommendations ranging from differentiating your brand with personalization to using knowledge management to drive customer engagement.

This Best Practices guide is full of information and research findings that will help you make a business case for your customer experience transformation.

Interested in how you can leverage artificial intelligence (AI) and machine learning now? Find out how robotic process automation and AI can be immediately incorporated into your service offerings to help your company stand out and improve shareholder value.

Bob Fernekees

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**A PRACTICAL GUIDE TO AI
IN THE CONTACT CENTER**

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Differentiating Your Brand with Personalized Customer Interactions

*By Ricardo Layun, Vice President,
Customer Care Services*

Delivering a personalized customer experience is crucial in today's retail environment that is all about the hyper-connected consumer. Studies have shown that 59 percent of shoppers will not return to a store after they've had a bad experience. Meanwhile customers that have had a great experience will spend 2.5 time more than those that did not.¹

Whether interactions are via phone, chat, or email, your customers expect a frictionless, seamless, and authentic experience. In fact, 49 percent of customers purchased items they didn't intend to buy due to a personalized recommendation.² And 71 percent of consumers express some level of frustration when their experience is impersonal³.

While more than 70 percent of retailers say personalization is their top priority, there is a disconnect between recognizing the need for personalization and executing those experiences well. A big factor is the proliferation of technology and ability to understand a customer's history and preferences across digital and physical channels. Understanding the customer journey across the myriad of channels in which today's consumers research products, make purchases, and interact is complex. While the data is there and available, it often sits in silos versus providing any customer service agent or store associate, from any location, the ability to quickly act on the data to deliver a seamless and personalized customer experience.

For example, making sure that a live agent immediately knows that the customer



on the phone who is calling to follow-up on an order recently placed has been a loyal customer for 10 years. The agents can then treat that customer with special attention and even make offers to reward that loyalty like free shipping on the order. Or something even more basic like just making sure that the agent has the data on hand to quickly determine why the customer might be calling to provide faster resolution and a seamless interaction. But this is rarely the case, instead, even some basic customer service inquiries go awry creating fiction and frustration—like when customers have to explain to a live agent what they just tried to figure out through IVR or via chat earlier.

DIFFERENTIATING WITH CUSTOMER CARE

The fact is that wow is only wow for so long before customers expect it. There are a few fundamental things that retailers and brands should do to stay competitive and exceed today's customer expectations.

1) Understand the Customer Journey

Customer journey mapping allows businesses to understand their customers' needs, preferences, and behaviors. That data can then be used to maximize every interaction with them to drive loyalty and reduce friction. This includes everything from understanding a customer's ordering and buying habits and preferences across physical and digital channels to make ordering easy; to leveraging machine learning and artificial intelligence (AI) to intelligently cross-sell to customers based on their known product interests.

But what's also important is giving customers choices to be as transparent as they like about how and how much they share their buying history, preferences, and interactions. For example, provide them with choices to opt-in or opt-out with any experience and to determine the extent that they want to share their information to drive personalization.

¹ "2017 POS/Customer Engagement Study," Boston Retail Partners.

² Hyken, Shep. "Personalized Customer Experience Increases Revenue and Loyalty," *Forbes*. Oct. 29, 2017.

³ "The 2017 State of Personalization Report," Segment. Oct. 26, 2017.



It's important for businesses to define how they want to influence the customer journey. What's the desired outcome? Start with strategy and build from there.

2) Leverage Self-Service

A consumer experience survey by Aspect found that 73 percent of customers surveyed want the ability to solve service issues on their own, while 76 percent said they will view the customer service they receive as a true test of how much a company values them as a customer.⁴ A CFI study also revealed 83 percent of shoppers indicate they prefer using self-service tools to resolve issues on their own.⁵

While there are many self-service trends on the horizon, providing customers with AI options and Visual Interactive Voice Response (IVR) technology are two popular and effective solutions available.

Chatbots are among the most recognizable AI applications for customer care. These virtual agents can answer basic questions for consumers and guide them on their journey to get answers online and are ideal for helping consumers access information and complete basic tasks that save retailers money and improve the customer experience. After all, customers find the need to interact with retailers to fulfill many different requests that don't necessarily require a live agent, such as order status and billing questions to troubleshooting and product inquiries. Virtual agents powered by AI provide a fast and cost-effective way to access a variety of information and data that can solve customer inquiries without having to go through traditional IVRs or live agents.

Bottom-line: Make it easy to get service and leverage the power of AI and machine learning to provide personalized customer experiences via loyalty programs, eCommerce sales, as well as in-store sales.

3) Invest in Mobile

An estimated \$669 billion in global retail commerce revenue will come from mobile this year.⁶ Recognizing the huge revenue potential that mobile presents, retailers are doubling down on their mobile technology investments. In fact, Boston Retail Partners' 2017 POS/ Customer Engagement Study found that mobile ranks among retailers' top engagement priorities: with 57 percent focused on mobile alignment and 46 percent on empowering associates with mobile tools.

With mobile devices in hand, customers can easily search and compare products and prices online, as well as read customer reviews and get instant feedback from their circle of friends via social media.

This transparency makes the retailer's job that much more difficult as they can no longer just differentiate on product or price. The customer experience is what drives customer loyalty.

In many cases, the physical store is falling short of meeting expectations in personalized service. The digital retail environment has reshaped what customers expect. They want personalized offers and recommendations when shopping online or via mobile that they don't usually receive when they shop in a store.

This is an area of opportunity for retailers as digital and physical retail continues to converge, and the key to personalizing the experience is the ability to identify a customer as soon as they enter the store.

Creating valuable and memorable customer experiences requires a commitment to process improvement and innovation, and there's no magic wand. Set the course, connect dots, get

the data, and make sure the technology is in place to continuously measure improvement and drive results. Businesses that are laser-focused on their customer journey strategy and leveraging the power of self-service tools and the mobile channel will be the ones that can successfully exceed customer expectations in today's integrated commerce environment. ■



Ricardo Layun leads Radial's customer service operations and contact centers, joining the company in June 2010. Previously, he spent 10 years with TRX/TATA Business Support Services as the Vice President,

Operations, responsible for the operational performance and strategic direction of the US contact centers as well as a contact center located in Berlin, Germany and Leicester, UK.

Between 1998-2000, he worked with Provident Financial located in Fairfield, Calif., leading a team of more than 1,000 credit services professionals. Layun began his contact center journey over 30-years ago at American Express in Plantation, Fla.

He holds a B.S. degree in Business Administrative Studies from Nova Southeastern University and has completed MBA coursework in International Management at Lynn University.

ABOUT RADIAL

Radial, the leader in omnichannel technology and operations, provides award-winning Customer Service centers powered by brand-focused customer service agents and industry leading technology solutions. Backed by a 30-year track-record of success, we help retailers and brands around the world deliver the customer experience consumers expect to succeed in the age of the consumer. Contact us at **877-255-2857** or visit us at **www.radial.com**.

⁴ "The Aspect Consumer Index," Aspect. May 2016.

⁵ "2016 Radial/CFI Study," CFI Group. May 2016.

⁶ Crawl, Jonathan. "How to Provide a Personalized Mobile Retail Experience: 3 Critical Steps," *Mobile Business Insights*. Mar. 13, 2018.



Successfully navigate your customer experience transformation

In this digital age, customer experience is your key differentiator. Customers want more than just a transactional relationship. They expect positive, personalized engagement that makes them feel special and compels them to continue the relationship. These experiences create loyal customers and a strong brand reputation. Choosing the right technology is essential—but it's only one step in the customer experience transformation journey.

Customer experience success entails the right mix of skills, processes and technologies that work together to achieve key metrics and meet specific business needs. Determining this optimal combination requires insightful planning as you design, deploy, operate and evolve your customer experience.

Every journey to customer experience mastery is different; there's no one-size fits-all plan. Select a strategic technology partner who will navigate your success using proven best practices and guidance to drives value from your investments. With this collaborative approach, a trusted advisor guides your journey before, during and after deployment.

SET YOUR STRATEGY

There's a lot to consider when you begin a customer experience transformation. The first step is to learn what's possible from new technology and what that means for your customer experience. Identify areas for improvement in terms of revenue, efficiency and engagement.

Next, evaluate your existing customer journey and processes to develop a clear plan to achieve your vision. You must understand your customers' needs to ensure your technology deployment supports them. Complete a comprehensive analysis of *who*, *what*, *where* and *when*.



- *Who* will you serve?
- *What* do you want to accomplish?
- *Where* do you want to take action?
- *When* will you implement these changes?

You also must identify where to implement new capabilities or process changes to meet goals and objectives. Supporting omnichannel engagement requires mobile, social and traditional channels; integration with back-office solutions; improved workforce management; and a platform that gives you a 360-degree view of every customer—for every interaction. Through proven best practices, you'll uncover missed opportunities that could generate value and enable you to create small and realistic business steps to rapidly increase your business outcomes.

Shape your vision by building a roadmap with the best solutions to

meet your business requirements and customer experience goals. Documented use cases provide a concrete analysis of improvements and expected benefits. Understanding the financial effects of improving your customer experience is critical to creating a solid business case and validating your request for investment.

ROI rationalizes your investment in a new technology, providing directional data and determining the efficiency of existing investments. Before finalizing any purchasing decision, consider key costs as well as the value they create:

- **Subscription/license costs:** Understand the subscription or license cost for the software, how many seats you will require each year and if you'll need additional, seasonal seats.
- **IT labor and support costs:** Determine if your solution requires IT staffing to ensure uptime and maintenance of hosted services—



and if that team will configure complicated IVR menus and workflows. Calculate the time and cost needed for software user support, onboarding and permissions. Finally, establish which team will build customer reporting or perform custom integrations and development.

- **Implementation costs:** Create an implementation timeline and consider if you need to add hardware to your existing infrastructure. Be sure to include any professional services needed during deployment, as these will add expenses.

GET READY

As your framework takes shape, evaluate job roles and responsibilities, internal processes, and skills development. Preparing for your transformation results in a more seamless transition and increased value realization.

IT and business leaders must work together to ensure the plan meets everyone's expectations. Start with new technology and plan to change related business processes. Track progress as you go and set clear metrics for your success. Don't forget to measure your performance against goals to ensure you have met your ROI.

Teams also need the skills and procedures to drive success. One of the most underestimated aspects of a customer experience transformation is the cultural change required to achieve and sustain it. Integrating systems and people into a holistic service and solution requires communication and resource orchestration across organizations. Define clear roles, streamline milestones and phases, and prepare to go live. You also must train frontline employees to effectively use these new tools and coach them on how to manage interactions. Leverage interaction analytics to pinpoint opportunities for improvement.

GO LIVE

When your platform goes live, the work is just beginning. This is when

you need to monitor your operation to determine if you're on track with the expectation you set during the strategy phase. Expect to see fluctuations that test your plans and then modify, as needed. You also must keep your technology aligned with evolving customer expectations and business needs.

Because deployment is just the start of your customer experience journey, your vendor must be clearly committed to your long-term success. With a true partner, the relationship will deepen as you address evolving goals and new challenges.

CHOOSE A VENDOR WHO FOCUSES ON YOUR SUCCESS

Because today's customer experience technologies are so complex, you need more than just a vendor selling a solution to succeed. Choosing a strategic partner that guides your journey as you design, deploy and deliver your customer experience gives you a clear advantage. The Genesys® PureSuccess framework provides both a comprehensive delivery platform and a trusted advisor to guide you through every step of your transformation.

The PureSuccess customer experience framework gives you everything you need during your customer experience journey. Three comprehensive PureSuccess offers let you choose your level of engagement; the flexible subscription plan lets you meet new challenges or objectives, as needed, or decrease use when you require less assistance.

- **PureSuccess Drive**—Receive guidance, hands-on leadership and reviews during each phase of your journey.
- **PureSuccess Guide**—Leverage instructor-led training and live consultations to adopt the skills, processes and technology you need to deliver the best customer experiences.

- **PureSuccess Equip**—Operate your solution independently with a full journey toolkit to create an exceptional customer experience. Access the extensive Genesys eLearning library as well as best practices and tools for testing, monitoring and troubleshooting.

Each PureSuccess offer provides educational materials and training to improve your customer experience capabilities year after year. You also gain access to a range of supplementary services from the PureSuccess catalog—at no additional cost.

And leveraging the PureSuccess framework gives you access to a Genesys Advisor to guide you throughout each phase of planning, deployment, utilization and evolution. Leveraging years of commercial expertise and customer success, your advisor is a single point of contact for orchestrating adoption and realizing the full value of your Genesys Customer Experience Platform. No matter which level of engagement you choose, your advisor will work toward your best interests—every step of the way. ■

Learn more about how the PureSuccess framework positions you to use Genesys technology to its full potential so you can make customer experience your competitive advantage.

www.genesys.com/resources/Genesys-PureSuccess-BR-EN.pdf





Everybody Loves a Bot: How to Wow Your Customers with Robotic Process Automation

In a world of instant gratification, it is difficult to impress the average consumer. They are demanding faster, more convenient, personalized service and support—and they want it delivered via the channel and device of their choice. You need to reduce or eliminate internal human effort wherever it does not add value or is not essential, but how can you do that using outdated legacy infrastructures and systems?

Robotic process automation (RPA) is the answer. This relatively inexpensive and fast technology can deliver transformative customer experiences at a time when your business needs them most.

This paper will help de-mystify RPA and help you get on the path to implementing RPA solutions in your contact center.

WHAT IS RPA?

RPA is the use of software “robots” or “bots” to automate tasks as if a real person were doing them. These software robots can be customer facing and can run non-invasively on an employee’s desktop, interacting with one or more existing applications and systems in the same way as a human user.

You can use RPA to augment, as well as fully automate, tasks to improve speed, accuracy, and efficiency. When thoughtfully applied, RPA has proven to have a significant impact on handle time, work accuracy, security, compliance, customer satisfaction (CSAT) performance, effort, cost savings, and sales revenue.

AUTOMATION BENEFITS

 <p>BETTER CUSTOMER EXPERIENCE</p> <ul style="list-style-type: none"> • Faster, more accurate, more consistent, lower effort interactions 	 <p>ACCURACY, COMPLIANCE, SECURITY</p> <ul style="list-style-type: none"> • 100% accuracy, no errors, no rework • Complete audit trail of transactions, tasks
 <p>PROFITABILITY AND COST REDUCTION</p> <ul style="list-style-type: none"> • Cost of a bot typically a fraction of a human • Quick to implement and short time to value realization 	 <p>LOWER RISK, NON-INVASIVE</p> <ul style="list-style-type: none"> • Bots typically overlay on existing systems • Avoids complexity and risk associated with updating legacy systems
 <p>PRODUCTIVITY AND EFFICIENCY</p> <ul style="list-style-type: none"> • Bots can typically complete tasks 4-5 times faster than a human worker • Work on demand 24/7/365 • Free people to focus on higher value tasks (e.g., service to sales) 	 <p>OPTIMIZE OPERATIONS</p> <ul style="list-style-type: none"> • Improves response times, accuracy • Scale and update to meet demand

HOW CAN WE USE RPA?

Here are just a few examples of areas in which companies are applying RPA to drive service innovation and business outcomes in their contact centers:

- Regulatory Compliance
 - Auto-population of fields across systems to ensure entry accuracy
 - Regulatory compliance, disclosure automation, metrics compliance

- Security and Fraud Detection
 - Single sign-on, identity and password management
 - Automated call fraud detection, secure payments, data masking
- Desktop Automation
 - “Click of a button” task automation, cut/paste, data entry
 - Eligibility checks, comparisons, data collection and analysis
- Personalized Care and Selling
 - Dynamic offer generation based on customer profile, purchase history, and product availability
- Intelligent Case Tracking
 - Case prioritization and service level monitoring
 - End-to-end case tracking and management

HOW CAN RPA AND BOTS HELP CONTACT CENTER AGENTS?

One of the most common starting points for RPA in the contact center is the agent desktop. The typical agent desktop environment is a myriad of systems and applications that are often disjointed and challenging for agents to navigate. Agents frequently have to work with 10 or 20 different systems, knowledge bases, and applications as they handle different callers and chats over the course of a single day.

Agents need to read, cut and paste, search, compare, and validate information across systems, all while under constant pressure from customers who demand personalized attention and accurate answers in real time. Tedious, time-consuming, repetitive tasks distract the agent from focusing on the customer, and complex procedures are prone to error and inconsistency, making it difficult for agents and care operations to perform at their best.

These challenges make the agent desktop an environment ripe for application of RPA. With RPA, all or a portion of these daily tasks can be automated, freeing agents to focus more on customer engagement, important decision-making, and desired business outcomes.

With RPA, agents can deliver a more focused, consultative engagement, resulting in a higher quality exchange with the customer. Other benefits include:

- Improved service consistency and script compliance
- Reduced customer callbacks
- Lower average handle time (AHT)
- Higher customer satisfaction and improved Net Promoter Score® (NPS®)
- Better utilization of knowledge base and agent tools
- Reduced agent training and onboarding time



RPA can also benefit other areas, from reducing or eliminating security, fraud, or compliance risks to improving case prioritization and management and back office work.

WHICH TASKS SHOULD WE AUTOMATE?

When looking at potential areas for automation, it's crucial to be discriminating. You need an understanding of the kinds of tasks and workflows that are *not* suited to automation, as well as those that are. Good candidates for chatbots and RPA are repeatable with simple steps, well mapped, seldom changing, and frequently performed. Poor candidates for RPA are highly complex, infrequently performed, often changing, and involve frequent exceptions that require human decision-making.

Identifying the right types of processes will help you avoid attempting to automate the wrong things. Below are a few of the characteristics you can use to determine what types of tasks you can automate with chatbots and RPA:

- **Data-intensive:** users need to manipulate or verify data across multiple fields or systems
- **Highly repetitive, high volume:** tasks completed thousands of times a day or week
- **Rules-driven:** "if X then Y" types of decision-making
- **Well-structured:** clear task starting and end points, inputs and outputs

Other criteria that can be signals for RPA candidates include processes or tasks that are:

- **Prone to human error:** complex, lengthy procedures with intense analysis, calculations, or policy interpretation
- **Highly regulated:** high risk of regulatory penalties if work out of compliance
- **Highly sensitive:** involve unnecessary exposure of customer or business data, potential fraud
- **Training intensive:** significant training time needed to teach users to be accurate and proficient

The most successful implementations are those where all or most of these characteristics are met, resulting in a strong business case and ROI.

KEY TAKEAWAYS

- **Select the right process/task.** Trying to accomplish too much at once or selecting an end-to-end process that is too complex often increases the potential risk of failure.
- **Don't believe all the hype.** Not all RPA implementations are as simple as some vendors may have you believe, and not every project will be "turnkey" capable of transforming your operation in a week. While some RPA solutions take as little as 2-4 weeks from development to implementation, others require business

CASE STUDY:

Automating Tasks with the Click of a Button

A global communications company was struggling to consistently address customer billing inquiries in a timely manner. Their customers were dissatisfied with the time it took to get an answer from agents on why their monthly bill had changed.

Convergys conducted a thorough time motion analysis of the customer "billing inquiry" journey and identified a set of repetitive process steps.

A billing comparison "bot" was built to automate these steps at the click of a button, reducing processing time by almost 60 percent, while generating a more consistent response to the caller's inquiry.

process and organizational changes, as well as technical factors such as deeper program integration, thus increasing time to benefit.

- **Don't implement RPA in a vacuum.** As with any technology-driven change, leaders need to think holistically about how RPA affects their services, processes, procedures, customers, and employees. Internally deploying RPA at scale can create a major culture, talent, and work shift, which may challenge established norms and raise concerns with your workforce. Timely, clear communication and coordination with all stakeholders is key to adoption and long-term success.
- **Do it yourself or get help?** No matter where you decide to start, some ongoing governance, development and maintenance, and business continuity planning will be necessary. You will need to decide if you want to handle these tasks yourselves, such as training current employees, hiring new technical talent, and maintaining and updating the technology, or outsource all or parts of your model.
- **Get started now!** Generally, early adopters of new technologies generate more shareholder value and market differentiation than those that wait. We believe organizations should start small, evaluate lessons learned, and scale best practices across their organizations along the way. ■

Why Convergys?

For over 30 years, Convergys has provided industry-leading technologies and services that balance customer satisfaction with cost reduction. We currently manage RPA for more than 30,000 users and 30 clients across a wide variety of front and back-office processes. Our typical RPA projects are self-funding, completed in weeks, and supported by our proven, industry-leading global operating model.



The Five Parts of Smart Customer Service

While there is no standard definition for “smart” customer service, most people would agree that it is service that is Scalable, Multichannel, Agile, Relevant, and Timely. Here is more about these five parts and how they lead to smart customer service.

1. SCALABLE

Scalable customer service not only refers to the ability to support a large number of users, but also to the ability to scale service quality. One could argue that customer service is even more mission-critical than employee-facing applications since moments of truth in customer service expose your brand more than any other customer interaction. Make sure your customer service system is proven in large-scale deployments. Moreover, a knowledge management (KM) system is essential to scaling quality of service across the agent pool and customer self-service systems. Without KM, your customer service systems will be “flying blind,” leading to agent frustration and customer defection.

2. MULTICHANNEL

Today’s customer is not “going multichannel”—they are “born multichannel”! These customers often undertake multichannel journeys to make a purchase or complete a service interaction. Remember “a journey saved is a customer earned or kept.” For instance, according to a recent Gallup poll, 40% of Americans have showroomed (researched in brick-and-mortar stores and bought online) at least once. A recent Harris poll revealed 69% of Americans have webroomed, where they browse Amazon and then pick up goods at physical stores. There’s no doubt that businesses that are able to design and deliver connected and consistent multichannel journeys will be better positioned to grab an “unfair” share of the market.

Customer Engagement Hubs (CEH) are fast emerging as the best approach

to deliver such journeys. A concept advocated by Gartner and increasingly embraced by market leaders, a CEH consolidates interactions, knowledge, processes, analytics, and administration into a common platform. The benefits? Connected multichannel experiences, improved contact center productivity and sales conversion, and reduced Total Cost of Ownership.

3. AGILE

Consumers are adopting and discarding communication channels and devices at breakneck speed. Look no further than MySpace and Blackberry. How can you keep up with today’s fickle consumers? Again, a CEH is the answer—the hub allows you to plug in new interaction methods and devices without creating new silos, frustrating customer experiences, and perpetual integration projects.

4. RELEVANT

Irrelevant service is as bad as no service. Providing smart guidance to customers across their multichannel journeys, reactive and proactive, can make or break customer journeys. A KM system that can deliver fast and accurate answers and help execute processes and next best steps that are compliant with best practices and regulatory compliance is key to success here. Look for a unified KM system that combines the power of multiple search methods, case-based reasoning that mimics human intelligence, and easy multichannel, multi-device access to take journey guidance and relevance to the next level.

5. TIMELY

“Better late than never” is not acceptable for customer service. Make sure you deliver on your promise by setting the right policy and leveraging service level management processes, including workflows that trigger alarms to proactively manage compliance. Note that customer expectations for speed of response vary across channels, industries, and the nature of the business.

While a multi-hour response time might be OK for email customer service, it might be tardy enough to take down a brand in a Twitter storm of complaints about a business’ non-response in social.

GETTING TO “SMART”

Like anything else, getting to “smart customer service” is a journey. Start by understanding the channel and device preferences of your customers, implementing the most popular touchpoints first. As the next step, prioritize journeys, including the touchpoints and the nature of the “touches” that are the most common and deliver the highest value for the business. Make those journeys memorable and friction-free. Take your service vision to reality with a knowledge-guided CEH approach to get “smart” for today and “smarter” for tomorrow. Going with a proven partner like eGain with best-of-breed customer engagement solutions, a unified multichannel platform, pioneering cloud capabilities, and 20 years of domain expertise has helped market leaders go from “smart” to the “smartest” in customer service, and so can you! ■

About eGain

eGain (NASDAQ: EGAN) customer engagement solutions power digital transformation strategies for leading brands. Our top-rated cloud applications for social, mobile, web, and contact centers help clients deliver connected customer journeys in an omnichannel world. To find out more about eGain, visit <http://www.egain.com>.

Headquartered in Sunnyvale, California, eGain has operating presence in North America, EMEA, and APAC.

To learn more about us, visit

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+91-(0)-20-6608-9200 (APAC).

VERINT®

Service with Sizzle: Using Knowledge Management to Drive Better Customer Engagement

There's a lot of talk surrounding customer service—specifically *excellent* customer service—and how to deliver it effectively. Why? Because service is a true competitive differentiator, and no matter how skillfully your organization attracts and engages customers across channels, you won't keep them for long if your service isn't great.

To wow customers with service that sizzles, start with the fundamentals: the ability to provide your employees with the right knowledge to respond effectively to customer inquiries. Your goal is to put the best tools and resources in the hands of the skilled practitioners who significantly impact the customer experience. This is the realm of knowledge management, and it's key to delivering complete, consistent, and contextual experiences. Let's take a closer look.

DELIVERING COMPLETE EXPERIENCES

You may already be weaving the various points of interaction together seamlessly for your customers, but what about for your employees? Knowledge management can provide them with key customer information that spans across products, lines of business, and communication channels, so they can deliver informed service that reflects the complete customer experience. Having all of this information in one place also helps address potential barriers to delivering top-notch service, such as the need to toggle between too many systems, lack of guidance for completing new or complex processes, and long handle times spent searching for information.

PROVIDING CONSISTENT ANSWERS

Knowledge management databases are equipped to contain a lot of information—anything an employee would need to know to deliver the right answers and resolve issues. Having a single, central knowledge base helps



ensure that your customer service team provides a consistent set of answers every time, regardless of location or channel. It can also empower employees to resolve issues on the spot, rather than having to pass customers on to subject-matter experts. It's a simpler, "one and done" approach for customers—and for your employees, too, since they can use a single interface to complete tasks and follow processes. In addition to looking up answers to common questions, your staff can input new information they've discovered, which can help expedite future interactions, while further reinforcing delivery of consistent answers.

OFFERING CONTEXTUAL VIEWS

Employees are most empowered when they're provided with a contextual view of the customer to personalize their interactions. A "contextual view" is all of the information—data points and next best actions—needed to answer questions and follow processes. Data points about the customer can be used to predict what knowledge and other information is likely to be needed next. Instead of searching

through the thousands (or millions) of articles in the knowledge base to answer a question reactively, the most likely candidates can be presented proactively based on the customer's contextual data points. This can make interactions faster and more natural, allowing employees to hone in on the customer and deliver personalized service. In turn, customers are more likely to feel valued and that their issue really matters to your organization.

Verint® offers knowledge management and other solutions that can help your organization simplify, modernize, and automate customer engagement. We can help you turn customer engagement into a sustainable competitive advantage, while reducing complexity and cost in customer operations. Contact us today. ■

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A Practical Guide to AI in the Contact Center

Are you interested in how artificial intelligence (AI) might impact your contact center?

What are the practical benefits of AI today? What kind of challenges arise from automation? What are the underlying technologies at play?

In our latest e-book, *A Practical Guide to AI in the Contact Center*, we've answered these questions and more. We have examined AI from a pragmatic lens and offered suggestions to minimize costs and maximize returns.

WHAT IS AI?

People tend to generalize their discussions of AI with all the underlying technologies. The artificial intelligence definition is open to interpretation. After all, there are several levels of "intelligent." For the purpose of business, we typically consider technologies that simulate or supplant human action as "AI."

The ambiguity of AI makes it a difficult concept to invest in. The idea of advanced technology deposing human effort has overt appeal. However, without a directive, AI is wasted intelligence.

Do you want a chatbot that can take and place orders in lieu of call center representatives?

Do you want a program that analyzes customer data and serves personalized marketing materials? Do you want an IVR that can understand natural language and route customers to appropriate agents?

LET'S LOOK AT SOME OF THE UNDERLYING TECHNOLOGY AND POTENTIAL BENEFITS:

Natural Language Processing (NLP)

Understanding language is a huge part of the AI equation. Language is complex and variable. Computers become more powerful and user friendly as they ingest language formulas and convert words to command functions. Whether through audible inputs

or chat, the more accurate the NLP, the better the AI can interpret inputs and match appropriate responses.

Voice Recognition

When a command starts as voice, AI must turn inflections and tones into text script. AI then interprets that text script and delivers a response. AI models that use voice recognition rely on trigger phrases and words for their understanding. When you ask Alexa or Siri what the weather is like, you are engaging voice recognition and an NLP system. Applied to the contact center, this type of digital signal processing (DSP) helps create advanced IVRs, voice transcriptions and some forms of advanced case management.

Machine Learning

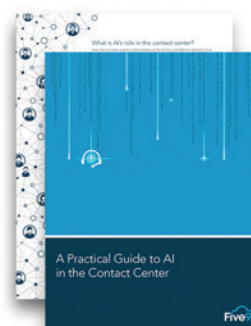
Machine learning is a foundational component of AI. The concept of machine learning is to have a base set of protocols that kick off a particular action. Then, have those protocols learn additional rules from responses to ascribed actions. We tend to think of machine learning as the scary doomsday element of AI – robots taking on more autonomous action than originally programmed. But actually, companies today are applying machine learning with narrow parameters, only allowing AI to learn specific tasks without broad variability.

Chatbots

Chatbots are an increasingly popular use case for an NLP and machine learning combination. You may have seen news of Facebook chat sessions led by fully automated service chatbots, but the idea of autonomous communication is nothing new. Similar to voice recognition, chatbots follow key words and phrases to assume an appropriate response. Often companies limit chatbot responses to a list of potential commands. If a query does not meet answer criterion, the chatbot may push the chat to a live agent. Chatbots today are mostly used as FAQs or as an additional form of call deflection. Chatbots may also serve as a routing tool, first used to decipher a customer's need and then pushing that context to a live agent.

Cloud

Cloud creates synergy. Its main function is to relieve the strain of on premises IT infrastructure and shift resources to a more centralized system. Cloud allows companies to appropriate processing and data storage power at scale. Companies can add more computer power to serve advanced program functions, and scale down if they need to conserve their IT spend. It's a much more economical model than buying a bunch of computers that may or may not accommodate needs. Cloud is the reason many companies can deploy AI today. Rather than pay for their own super computer, companies can lease AI through the cloud network. That, or they can build their own AI that scales according to demand rather than constantly monopolizing computational bandwidth. ■



Download the full [Practical Guide to AI in the Contact Center](http://www.five9.com/media_library/ebook/eBook_AI_Contact_Center_Practical_Guide.pdf) at www.five9.com/media_library/ebook/eBook_AI_Contact_Center_Practical_Guide.pdf to learn more about AI's role in the contact center, how it's being used by companies today, how to prepare for an AI future, and more.

About Five9

Five9 is the leading provider of cloud contact center solutions, bringing the power of the cloud to more than 2,000 customers worldwide. Five9's solution helps contact centers create exceptional customer experiences, increases productivity and boost revenue. For more information visit www.five9.com or call 1-866-898-4019.

Alexa (and Her Cohorts) Will Change Your Business

The revolution is coming, and SMBs must get ready

I HAD THE OPPORTUNITY to add a couple of questions to the monthly *Wall Street Journal*/Vistage Small Business CEO Confidence Index back in February, thanks to Vistage's chief research officer, Joe Galvin. One question gave respondents an opportunity to rank seven areas in order of importance to their business. According to the survey's 486 respondents, improving the customer experience was the most important, beating out factors such as improving operational efficiencies, retaining talent to better serve customers, and improving the ability to implement new business ideas.

When asked which technology—including artificial intelligence, chatbots, connected devices, Internet of Things, blockchain, and voice assistants like Alexa—will most impact their business in the next 12 months, fewer than 5 percent said Alexa (or Siri, Cortana, or Google Assistant). But with improved customer experience as their biggest priority, SMBs must consider how quickly voice assistants are changing customer behaviors and expectations.

CUSTOMER ADOPTION IS ACCELERATING

It's tempting to view smart speakers and voice assistants as quirky gadgets that only nerds will use. That may have been true in 2016 when I did my first "voice-first" presentation at CRM Evolution; only about 700 skills had been developed then for Amazon Alexa. By this year's conference, there were 30,000. That astronomical growth

applies to the installed base of smart speakers. In 2016 there were fewer than 8 million smart speakers installed; that number is expected to surpass 50 million this year. And according to a Juniper Research report, 55 percent of U.S. households will have at least one smart speaker by 2022. That equates to 70 million households with a total installed base of 175 million units.

These numbers show how quickly people are adopting these devices, and they are just as swiftly adapting their behavior, using their voices to do all sorts of things. According to an NPR study from earlier this year, 31 percent of smart speaker owners say they voice-controlled household devices in the previous week. Seventy-one

percent say they've listened to more audio since getting a smart speaker, and it's not just more music; they're also taking in more podcasts and news.

The fascination with using voice commands has voice assistants showing up in all sorts of devices, including computers, tablets, and a host of others. Dish Network now lets you control your TV with Alexa, and Toyota announced at this year's Consumer Electronics Show that it will be putting

Alexa in certain models so drivers can keep their hands on the wheel while requesting music, traffic info, and so on.




VOICE-LED DIGITAL TRANSFORMATION

Voice assistants may not be mainstream just yet, but as the above examples illustrate, objects in your rearview mirror are closer than they appear. And it's not just that adoption is accelerating, but why.

Using their voices to ask for things comes easy and natural to humans. Speech recognition technology, along with artificial intelligence, is leading a digital transformation that has gone unrecognized by many but is radically changing how we're experiencing the web.

Nothing is more basic than the way we use Google to search. We've been typing into that little search box for years to get links to the info we want. But according to comScore, 50 percent of all searches will be spoken by 2020. Less dramatic but heading in the same direction are estimates that show voice shopping hitting the \$40 billion mark by 2022. It's easy to see how more of our interactions, designed to be smarter and friction-free, will be with voice assistants in the coming years.

But these interactions are not just more consistent and efficient, according to a study commissioned by Google; 41 percent of people who own voice-activated speakers say it feels like talking to a friend. That helps set the stage for a powerful customer engagement platform that goes way beyond smart speakers' original purpose.

With customer experience being so crucial to business success, it's time to get serious about exploring what experiences you can create for consumers—and this starts with realizing that in their day-to-day lives, the experiences they're choosing more and more involve voice-first devices. 

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.

MORE THAN HALF OF
U.S. HOUSEHOLDS
WILL HAVE AT
LEAST ONE SMART
SPEAKER BY 2022.



MORE DATA DOES NOT MEAN BETTER DATA:

The Quest for Real Customer Intelligence

From delivering on the promise of people-based marketing to leading the customer-centric enterprise, today's marketers look to do more than just advertise products. They're working to deeply engage their customers as *individuals*. That's no easy task under any circumstance, especially as GDPR looms—but a major, preventable, oversight makes this goal immensely harder to reach. B2C marketers persistently fail to address the fact that *people change*.

KEEPING UP WITH THE JONESES

The culprit is out-of-date CRM data. Customers—like all people—undergo changes big and small, from switching jobs, to having children, to joining new social media platforms. But rather than keeping up with the change, marketers are often strapped with data that's mired in the past. Marketers want to engage each customer in an evolving discussion; but the old data keeps them stuck rehashing conversations that are out of date and out of touch.

SOME DATA PROVIDERS FEED THE PROBLEM

Consider this Deloitte survey¹ from 2017. An analytics team at Deloitte asked 107 participants to review their data profiles created by "a leading consumer data broker," and to rate their profiles for accuracy. More than two-thirds of respondents found their profiles only 50% correct *at best*; one third found their profiles at best 25% accurate. And the most common error the survey-takers cited was outdated data. One respondent said that reading the profile was like getting "a snapshot of a point in time 10 years ago."

Many marketers will find Deloitte's survey findings alarming. But those findings are in line with the overall state of the marketing data ecosystem. As Neustar VP of Marketing Julie Fleischer wrote last year², "43 percent of customer records are out of date or invalid, and 60

percent of data is incorrect within two years." Simply put: First-party CRM data is not keeping up with customers.

Of course, there's a lot of keep up with. In the U.S., an estimated 60 million people move every year. 2.1 million people legally change their names annually. 75 million consumers switch phone carriers every year, and 45 million people change their phone numbers. In 2017, an additional 5.5 million Americans "cut the cord"³ on their pay TV subscriptions, while 1.9 million Americans joined Netflix⁴ in Q4 alone. Between all the life changes, address changes, transforming media habits and more, every customer is a work in progress—and a rapidly moving target.

PRIVACY CONCERNS COMPLICATE PRE-EXISTING CHALLENGES

The challenges are only getting steeper for digital marketers. On the one hand, the ongoing data explosion means more customer information than ever before for marketers to stay on top of. On the other, ongoing privacy changes take once-readily-available information off the table. Indeed, Neustar estimates that in 2000, 75% of key consumer information was publicly available in the U.S.; by 2016, that number had dropped to just 15%. As GDPR takes hold in Europe, and data privacy issues come to the fore worldwide, the proportion of publicly available data is likely to drop still further. As a result, marketers are left struggling to keep a massively growing pool of customer data up to date—while watching the pool of readily available data shrink all the time.

Technical issues like these, though, are only a part of the problem. A potentially deeper challenge stems from how brands and data providers view customer data to begin with—a view that gets to the root of why so many data providers can offer old data and still thrive. As Neustar's Fleischer explains, many data providers

1 <https://www2.deloitte.com/insights/us/en/deloitte-review/issue-21/analytics-bad-data-quality.html>

2 <http://www.adweek.com/brand-marketing/7-questions-marketers-should-consider-when-weighing-the-quality-of-their-data/>

3 <http://variety.com/2017/biz/news/cord-cutting-2017-estimates-cancel-cable-satellite-tv-1202556594/>

4 <https://www.recode.net/2018/1/22/16920150/netflix-q4-2017-earnings-subscribers>



“use stale data because it provides the illusion of scale.” They’re selling their data in an ecosystem built on the premise that *more data points are better*. But that premise is clearly not correct: more data *isn’t* always better, and sometimes, old data can be more misleading than no data at all.

CUSTOMER-CENTRIC MARKETERS MUST FACE CHALLENGES HEAD ON

Put differently: over the course of amassing arsenals of customer data, we’ve shifted the focus away from trying to understand the real people we market to—and are focused instead on simply gathering as much data as we can. As Nate Silver⁵ might say, we’ve replaced the signal with the noise. And as a result, we’ve seriously complicated the already-staggering task of engaging customers as the evolving individuals they are.

To make people-based marketing and customer-centric businesses work, we need to shift the data focus yet again—away from numbers for numbers’ sake, and back to understanding actual people. One crucial step to making that happen is to ensure that internal teams and data providers alike are committed to boosting data quality and then taking that data and turning it into customer intelligence.

FIVE STEPS TO TURNING DATA INTO CUSTOMER INTELLIGENCE

In practice, there are five steps that need to be taken to transform first-party data into meaningful, actionable customer intelligence:

1. Reduce costs and confusion by consolidating customer intelligence to a single customer record. This will help eliminate waste like sending multiple catalogs with different versions of the same name to the same household address.

2. Fill in gaps in the database with the most current and accurate identity data (name, address, phone number, email, etc). Complete records are more valuable than fractional ones.
3. Enrich static, flat records with segmentation data like demographic, geographic, psychographic, and behavioral attributes, to improve targeting.
4. Proactively capture any changes in customer data, like changes in address, phone number or new email addresses, to ensure your view of identity is persistent and always on and you can catch them when they are in-market.
5. Connect offline identity elements to online ones in order to create a single omnichannel view of your customer. Your customers flow seamlessly between online channels and the physical world. Your marketing should recognize them wherever they are.

Dedication to building true customer intelligence means committing, too, to partnership with a vendor that can accomplish these five steps and do so in a neutral, privacy-friendly way. Brands that make this commitment are primed to achieve every marketer’s ultimate goal: to create better, more impactful customer experiences. ■

Neustar, Inc. is a leading global information services provider driving the connected world forward with trusted, holistic identity resolution. More information is available at www.marketing.neustar/customer-intelligence

⁵ <https://www.amazon.com/Signal-Noise-Many-Predictions-Fail-but/dp/0143125087>

Despite Technological Advancements, Live Agents Are More Crucial Than Ever

Technologies such as IVR are able to address straightforward questions, leaving the complex ones for agents to handle

Customer satisfaction with contact centers continues to climb, reaching a score of 70 on a 100-point scale in the latest CFI Group Contact Center Satisfaction Index. The score was 68 in 2017.

The report attributes this increase in large part to improvement with agents themselves. It found that agent knowledge, in particular, has improved 4 percent since 2017, suggesting that customers generally feel that agents are better able to understand their issues and provide accurate information to address them.

“What we’re seeing is that companies are putting in the training, they are making sure that agents have the tools and technology at their fingertips to help customers,” says Sheri Petras, CEO at CFI Group.

The report somewhat downplays the many technological advances in customer service. Petras pointed out that while many of these technologies “let agents be more effective more quickly,” they “aren’t necessarily customer-facing all the time.”

And although new technologies are changing the ways in which customer service is delivered, the role of the agent is not diminished, according to the report. In fact, 88 percent of customers who reach interactive voice response (IVR) systems still end up talking to live agents to resolve their issues, indicating that live agents remain as crucial as ever.

“As people become more able to self-serve, the role of the agent becomes more difficult. Most issues that come

into agents now are too complicated to have a canned [response]...[from an] IVR or any of the new technologies,” Petras explains.

She also emphasizes that IVR and other technologies should complement live agents. “As opposed to eliminating a customer having to go to a live agent...



these technologies need to be viewed as a road to get to the agent, [or] a way to get the customer’s problem solved quickly. Oftentimes, that means getting them to the right agent, or for very easy things that people may call about frequently, it means making sure that those questions can be answered at the touch of a fingertip,” she says. “It’s not going to take away the need for live agents.”

The report also found that although the phone remains the preferred channel for customers (79 percent), other channels should not be ignored. Email stands at 20 percent, up from 14

percent in 2017; online chat is at 12 percent, up from 9 percent in 2017. Additionally, 11 percent use an online contact form, while 3 percent use Facebook.

Digital properties—including websites, mobile apps, and social media pages—are other crucial components of customer service, the report asserts.

It found that 72 percent of customers visit digital properties to resolve their issues before ever contacting customer service. More specifically, 57 percent went to company websites on a variety of devices (43 percent on laptops, 42 percent on tablets, 33 percent on desktops, and 12 percent on mobile phones), 15 percent went to company mobile apps, and 3 percent went to other properties, such as social media pages. Furthermore, 9 percent went to other websites, such as those of competitors or pages from search results.

Yet with the surging popularity of digital means of contact, many companies measure and manage their digital properties separately from the contact center, the report found. This is a mistake, it asserts, noting that companies should view their digital properties as part of the customer service journey and should equip them with tools that help customers

address service issues. It also suggests that companies should analyze their call data to identify opportunities for developing new self-help tools. —Sam Del Rowe

“These technologies need to be viewed as a road to get to the agent, [or] a way to get the customer’s problem solved quickly.”

Most Consumers Don't Finish Online Forms

Clutch survey finds that 81 percent of people have abandoned at least one online form, and few return to complete them

Businesses rely on online forms to help them survey customers, sell products, gather leads, collect email newsletter signups, and even fill vacant job slots, but customers often abandon forms instead of completing them, new data from Clutch Research revealed.

Eighty-one percent of people surveyed by Clutch said they abandoned at least one online form recently, with nearly a third (29 percent) citing security concerns and more than a quarter (27 percent) quitting forms that are too long. Other reasons cited included companies hitting them with advertisements or upsells (11 percent) and asking unnecessary questions (10 percent). The research also found that consumers are likely to abandon online forms that aren't mobile-friendly.

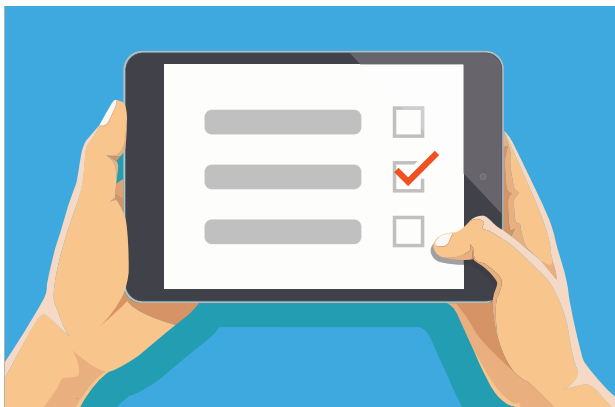
"Frequent news of security breaches has made consumers more wary of brands. These events range from credit card identity theft at major retailers, such as Target and DSW, to privacy breaches by trusted companies such as Facebook," says Michelle Delgado, a content developer and marketer at Clutch. "Additionally, many consumers have been inundated by spam emails and phone calls after sharing their information with companies, and it can be difficult to identify the source in these instances."

Regardless of why, the survey found that when consumers abandon online forms, they are unlikely to return. A full 67 percent abandon the

process entirely, and only 13 percent come back to complete the forms later. Ten percent choose another company, and 7 percent contact customer service.

The survey suggests a major challenge for businesses that rely on online forms.

"I think it's more than just losing the conversion," says Stu Collett, founding



partner and principal design director at Super User Studio, a digital product and service design consultancy. "It's [someone] losing connection with your brand."

Because security is such a major concern, Delgado notes that companies can increase form completions by improving security.

"To help build trust with consumers, companies should be as transparent as possible about why they are collecting information and how they plan to keep it secure," she says. "Simple steps such as adding a disclaimer that an email address will never be

shared with a third party can go a long way toward building trust, as long as it's true. Additionally, companies should

invest in encryption and use email verification to help protect consumers from security issues."

Another way businesses can improve their online forms is by eliminating extraneous questions, according to Delgado, who notes that the chance that consumers will complete online forms diminishes with each question added.

Companies will also do well to consider online forms as an extension of their overall customer service efforts. A key part of that is following up. Clutch's research found that nearly one in five people (19 percent) will complete an online form if the company contacts them through email (12 percent) or

a phone call (7 percent). Despite this opportunity to win conversions, 11 percent receive no follow-up contact after filling out an online form, suggesting yet another missed opportunity for businesses.

"I was personally very surprised to learn just how effective follow-up messages can be," Delgado says. "These findings suggest that consumers appreciate and respond to personal outreach from

a company, even if they had to quit an online form."

With that in mind, Delgado recommends that companies collect email addresses early in the online form so they can reach out to customers who fail to complete it.

When people do return to previously abandoned online forms on their own, it's typically because they need access to resources they can't obtain any other way (30 percent). An additional 20 percent are willing to return in exchange for an incentive, such as entry into a contest.

As part of implementing best practices in online form design, businesses should also test changes to their online forms with target audiences. Over time, testing can yield higher conversions by revealing audience preferences for online form design. —Leonard Klie

Keynote speaker Brian Solis, principal analyst at Altimeter Group, described today's customers as "accidental narcissists."



ON THE SCENE: CRM EVOLUTION AND SMART CUSTOMER SERVICE

Speakers Focus on the Human Elements of Customer Experience

Humans are emotional, and responding to them requires companies to make an emotional connection

Whether describing customers as “accidental narcissists” or stressing the need to convert them into brand advocates or brand storytellers, speakers throughout the collocated CRM Evolution and Smart Customer Service conferences in Washington in early April urged attendees to focus on the human element with customers and employees alike.

“When we talk about customer experiences or employee experiences, what we’re really talking about is how someone feels and reacts in those moments that we’ve designed for engagement,” said Brian Solis, principal analyst at Altimeter Group, in his opening keynote on April 9. “When we’re making technology investments, it’s not just about facilitating the transaction; it’s [about whether] you can engage someone in a way that isn’t just compelling or productive but meaningful.”

Solis asserted that reliance on old technologies, processes, and ways of

thinking has handicapped companies’ efforts to deliver exceptional customer and employee experiences. “We’re making decisions based on how we understand business works, but a lot of those models and processes are now coming up on 50 or 60 years old,” he said. “We’re doing so not just from a legacy perspective, but we’re starting to become increasingly irrelevant in how we’re making those decisions and how they should play out.”

The challenge for companies, he said, is that technology increasingly gives people a greater sense of importance, turning them into “accidental narcissists.” “That is simply because technology is consuming. Every app you use, every device you use tells you [that] you are the most important person in the world,” he said. “When we’re designing

for customer experiences or employee experiences, what we’re really looking at is how to design for accidental narcissists in ways that they can experience our businesses in one moment and the sum of those moments to equate to what our brands should be.”

During an afternoon session, Randi Busse, president of Workforce Development Group, laid out five methods for enlisting customer advocates: First, engage employees so they make decisions, solve problems, and do right by customers. Second, establish rapport, demonstrate care, and show genuine interest in customers and their needs. Third, eliminate obstacles that get in the way of customers doing business. Fourth, be aware of what customers want and how they want to be treated. And finally, forge an emotional connection that makes customers feel special and appreciated.

Chip Bell, senior partner at Chip Bell Group, asserted that the highest level of customer advocacy is when companies get customers to tell their stories for them.

That is predicated on loyalty, which is driven by three factors, according to Aimee Lucas, vice president and customer experience transformist at Temkin Group. They are: success, or the degree to which customers accomplish their goals; effort, or the difficulty customers face in accomplishing their goals; and emotion, or how the interaction makes customers feel.

Of these three, emotion “has the strongest impact on the customer likelihood

to buy more from you in the future, willingness to try new products and services when you introduce them, willingness to trust your recommendations, likelihood to recommend your company to others, and willingness to forgive the company when it makes a mistake,” she said.

While customers and companies can do more in customer service today than

they could a few years ago, automated customer service systems are still far from being able to conduct the free-flowing

“We’re making decisions based on how we understand business works, but a lot of those models and processes are now coming up on 50 or 60 years old.”

conversations that consumers expect, officials at Amazon pointed out during their keynote address that opened day two of the collocated conferences.

Chief among the advances is natural language understanding, so customers can have natural conversations with systems backed by unlimited computing power in the cloud, according to Vikram Anbazhagan, head of product for language technologies at Amazon.

Today's automatic speech recognition technologies can understand audio and convert it to text, and natural language understanding then takes that text and deciphers intent, Anbazhagan said.

But despite those advances, more has to be done to imbue conversational automated agents with social intelligence, personality, multimodality, and dynamic capabilities, he said.

Of particular importance today is multimodality, with a real need for automated agents to combine speech and text capabilities simultaneously on the same channel, according to Anbazhagan.

And the cloud will continue to make other advances possible, added Pasquale DeMaio, general manager of Amazon Connect, Amazon Web Services' web contact center suite. "We see the world's movement to the cloud as table stakes today for most companies," he said.

The cloud enables companies to scale their contact center operations up or down quickly without having to move a lot of expensive hardware, DeMaio said.

"The contact center is changing. The world is moving to a more open architecture where you need to be able to move people around quickly," he said. "It's all about business velocity."

Just as important is the need for services to be personalized and dynamic, DeMaio added.

All of this is part of the communications revolution in which businesses find themselves today, said Paul Greenberg, managing principal at the 56 Group, during another CRM Evolution session later in the day.

"There was never a business revolution. It's all been part of a communications revolution, where how [companies] communicate, what they communicate, and which channels they use to communicate have changed more than the businesses themselves," he explained.

Greenberg harked back to 2002, when customers and consumers relied on only two touch points to interact. In 2017, most companies had at least six touch points in place, and some had far more than that.

An even more pressing change has been the addition of terms like cus-



tom experience (CX) and customer engagement (CE) to the CRM lexicon. While the three terms are often used interchangeably, they are very different, Greenberg noted.

CRM, he said, involves technology for sales, marketing, and customer service to capture and interpret customer data and then automate processes and workflows around that data. CX is about the perception customers have of their interactions with a business, or how the customer feels about the company over time. CE, on the other hand, "reflects the ongoing interactions between the company and the customer, offered by the company and chosen by the customer."

For companies, that means knowing customers, meeting their expectations, developing relations with them, treating them as partners, and making them feel valued. Execution of those goals requires aligning and integrating business

operations, sales, marketing, and customer service, and then creating programs and strategies "so customers can sculpt their own relationship with you."

But it all comes down to customer trust. "The bottom line," Greenberg said, "is to do what you say and be believable."

The trust issue also comes into play with how companies treat their employees, and that relationship is becoming more complicated as Millennials make up a bigger share of the workforce.

Terra Fletcher, founder and marketing consultant at Fletcher Consulting, asserted that Millennials don't separate work and personal life, fueling a greater desire for meaningfulness in the workplace. She laid out five tenets for companies with Millennial employees: (1) don't dwell on the past; (2) evaluate and trim down rules; (3) interact face to face more often; (4) don't hesitate to correct Millennials; and (5) explain clearly why policies or processes are in place.

Jean Mork Bredeson, president at SERVICE 800, delved into the thorny issue of measuring the customer experience. She noted that Net Promoter Score (NPS) is a common metric, but while NPS moves in response to improvement efforts, a change in NPS does not always correlate with an increase in company revenue. Going forward, she said, measuring customer experience will require customizable surveys that focus on emotions.

In this day and age, social media is also important, "giving a megaphone to your customers to allow them to share their stories to more people louder [than ever]," Busse noted.

She identified five practices to ensure customers' stories are positive: (1) value them as you would members of your own family; (2) engage in a dialogue with them as opposed to interrogating them; (3) solicit their feedback and keep them in the loop about their suggestions; (4) empower employees so they are invested in the company; and (5) go beyond products and services and indicate to customers that you're there for them.

—Sam Del Rowe and Leonard Klie

"There was never a business revolution. It's all been part of a communications revolution."

Keynote speaker Shashi Seth, senior vice president of Oracle Marketing Cloud, announced AI additions to the CX Cloud Suite.



ON THE SCENE: ORACLE MODERN CUSTOMER EXPERIENCE

Oracle Provides Marketers with New Capabilities

As companies get more data, marketers have greater opportunities to increase revenue, Oracle's Marketing Cloud leader says

More is expected from marketers than ever before, but if they use the data they have available from their own resources and from third parties, they can be heroes within their companies, Shashi Seth, senior vice president of Oracle Marketing Cloud, told the roughly 2,500 attendees at the Oracle Modern Customer Experience 2018 conference in Chicago.

"For the first time, CMOs are holding revenue targets in their teams," said Seth, a last-minute keynote speaker fill-in for Mark Hurd, Oracle's CEO, who had to cancel due to illness. "If you asked CMOs two years ago, they would have said brand building was their No. 1 target. Two out of three CMOs already have revenue targets as their No. 1 goal. That never used to happen.

"There is so much changing; we as marketers need to change, too," Seth added. "In 2008, there was a sea change for ad tech; it became focused on performance. [This year] will be that for martech."

To hit revenue targets, CMOs need data to develop strategies for acquiring and engaging customers, increasing their revenue per user and lifetime value, and decreasing churn, Seth explained. That means understanding customer behavior at all touch points, including mobile, desktop, and in physical stores.

Oracle pledged to help companies do all of that by continuing to evolve its marketing tools, products, and support structures to support the changing marketing landscape. The company used the conference to introduce updates to the Oracle Customer Experience (CX) Cloud Suite, including a new loyalty platform and new features in the Oracle Marketing Cloud, namely, Oracle Infinity and Oracle CX Audience.

All of the updates to CX Suite introduce artificial intelligence-based applications, data analytics, and search, voice, and video capabilities.

The Oracle Loyalty platform will help companies engage customers with personalized omnichannel loyalty programs.

Oracle Infinity will provide intelligence to help marketers optimize customer engagement across channels; combine behavioral insights from all users; unify behavioral data within the marketing organization and across digital touch points; develop and distribute actionable insights to the broader business user community through built-in integrations and customizable APIs; enhance the performance of marketing automation systems; and manage large and complex enterprise data sets.

Artificial intelligence is becoming increasingly important for marketers and for others across the enterprise, Forrester Research analyst John Bruno told the audience. In fact, marketing and sales tend to be the biggest users of AI today, he pointed out.

That's why Oracle is including AI throughout its CX upgrades. The new Oracle CX Audience, for example, allows users to create audience segmentation data and segment performance analysis to uncover customer sub-segments that could provide additional opportunities. It brings together all first-party and third-party data in real time, enabling marketers to use the information for orchestrated campaigns, according to Seth.

Other Oracle CX enhancements include a virtual sales assistant that simplifies access to frequent CRM commands by supporting voice or text requests. In addition, the virtual assistant supports custom extended objects and attributes, can push notifications for event and task reminders, and can surface next-best-action insights about sales opportunities.

Oracle also launched several campaign effectiveness dashboards to help marketers automate lead scoring and execute regional marketing and event promotions.

Within the next year, Oracle expects to release several other platforms, including AI Source, to help marketers understand which channels to prioritize, and Next Best Offer, to push out offers expected to result in better open rates and better conversion rates, according to Seth. —Phillip Britt

REQUIRED READING

Encouraging Companies to *Do Good* (and Make Money Too)

Customers increasingly expect companies to be good citizens

Good deeds are no longer optional. This is the premise of *Do Good: Embracing Brand Citizenship to Fuel Both Purpose and Profit*, which asserts that people commit to companies that perform acts of good citizenship. Associate Editor Sam Del Rowe spoke with author Anne Bahr Thompson to learn more about the book and her brand citizenship model.

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

Anne Bahr Thompson: The concept of brand citizenship evolved from the grassroots up. It's not a model I set out to create. In 2011, I was conducting research in the United States and the United Kingdom. We asked people about their hopes, fears, and concerns; the issues that were important to them; career choices; and which companies they thought would exhibit leadership, which were good or responsible corporate citizens, and which were bad or irresponsible corporate citizens.

People's responses were far more worthy than I expected. They were concerned about big issues: paying mortgages, healthcare, school fees, and more. The companies they named as good corporate citizens, and the reasons they gave for choosing them, were even more surprising: They wanted businesses to step in and fix the problems government wasn't addressing.

How have consumers' expectations regarding companies being good citizens changed?

Real people define good corporate citizenship differently than experts and academics. For real people, good corporate citizenship spans what I call the ME-to-WE continuum. Because so many companies make promises they don't keep, good corporate citizenship begins with doing what you say, delivering on promises, and cultivating trust, before spanning out to solve greater concerns about the environment, social issues, the economy, and more.

Companies can no longer expect customers and employees to advocate for them if they don't first advocate for the things that matter most to customers and employees.

What are some examples of companies being good citizens? What has the response been to these acts of good citizenship?

There is not just one type of brand citizenship. Multiple approaches along the ME-to-WE continuum resonate with people.

SunTrust, a large regional bank, is a great example of a brand that is building trust and solving ME problems. It reinforces its brand purpose, "to light the way to financial well-being," through its free onUp program. [This program] teaches people to be good stewards of their money, no matter how modest their means. Importantly, the program is open to anyone, not just SunTrust customers.

At the other end of the spectrum is Lush Handmade Cosmetics. The company continually finds ways to connect its fans to sustainable products, fair trade, and philanthropic causes, and better the world.

These acts lead to greater brand loyalty, a stronger reputation, and ultimately increased profits.



The book proposes a five-step model. What do each of the steps entail?

The five steps of brand citizenship logically flow from one another:

Trust is the starting point for good brand citizenship, not the end game. First and foremost, people expect the brands they buy and the companies they work for to live up to their promises.

Step two is enrichment. People identify more with and are less price-sensitive toward companies that help them simplify their routines, make mundane tasks less dull, and enrich their lives.

Step three is responsibility. It's the pivot point between being a ME and a WE company. Most importantly, though, people will not give you credit for sustainability programs or fixing your supply chain if you do not treat employees well.

Step four is about cultivating a sense of community and connecting and rallying customers and employees through shared values.

Step five is contribution. Companies that actively create a more positive and life-enhancing future make customers, employees, suppliers, and other stakeholders feel like they are contributing more through association.

So how do companies get there?

Doing good can no longer be a cost of doing business. It's an essential investment in loyalty and reputation management. Brand citizenship is an ethos, not a check-the-box exercise. It's a long-term journey. It takes courage to commit to benchmarking performance based on your social impact as much as your market share, cost management, and profit. You also have to be willing to accept that there are no definite business models for doing good. Every company has to learn the best way to do this based on its own larger purpose.



CRM LOOKS FOR ITS LINK ON THE BLOCK

**LARGELY USED FOR FINANCIAL TRANSACTIONS,
BLOCKCHAIN TECHNOLOGY IS FINDING ITS WAY INTO
FRONT- AND BACK-OFFICE APPLICATIONS**

By Paul Korzeniowski

Blockchain has ridden the coattails of cryptocurrency medium Bitcoin to become a common term. A simple Google search reveals about 27 million documents mentioning the word. But despite its financial roots, the technology is no longer limited to financial transactions. Like other horizontal high-tech solutions, such as cloud computing and artificial intelligence, blockchain has the potential to dramatically change how all enterprise applications, including customer relationship management (CRM) systems, are designed.

Though the process is in the early stages, the branching out of blockchain from its financial transaction niche has already begun. “Widespread use of blockchain in CRM is about three to five years away,” predicts Windsor Holden, head of forecasting and consultancy at market research firm Juniper Research.

Blockchain represents a fundamentally different approach for writing software (see the sidebar on page 31). Traditionally, applications functioned as autonomous units, systems that operated within defined areas and followed set routines. Through the years, vendors have devised ways to make applications more modular and more dispersed. Blockchain takes that movement to a new level.

CHAIN

At its heart, blockchain offers a powerful, flexible data management foundation. CRM is all about data—storing and retrieving records of transactions and interactions between suppliers and customers. As CRM and related technologies have advanced, businesses' front- and back-office systems have become more intertwined, leading companies to seek more of a 360-degree view of customers. Blockchain could help deliver it.

One onerous problem is that data is siloed—stored and used differently by each department. Marketing's view of a customer interaction is much different than the customer service group's view. Because of the diverse breadth of information, delivering the appropriate view of a customer to an employee at an important part of an interaction remains a significant challenge. Employees typically rely on Big Data, analytics, and other tools to mine information and create the needed slice of information, but the process is time-consuming and quite often flawed.

Blockchain promises to deliver more data consistency without sacrificing application flexibility. This architecture has an amorphous, open, distributed design capable of morphing in a seemingly never-ending number of ways. Unlike traditional software, this approach borrows from open-source ideals and is designed to be accessible and easy to implement. "Anyone with a computer could set themselves up as a node in Bitcoin's network and view the records on the chain," Holden says.

As a result, data silos break down. Rather than multiple copies of a customer's personal information confined in various systems, all applications have access to one set of characteristics. Consequently, companies could reduce redundancy and increase responsiveness.

BUILT-IN SECURITY FUNCTIONS

Enhanced security is another potential benefit that blockchain brings to CRM. With traditional applications, security is cobbled on top of the applications rather than being an inherent part of them. That is not the case with blockchain. Not

only is security included in each piece of code, but it has a distributed architecture. "The beauty of blockchain is that it is inviolable: You cannot erase a transaction from it," Holden explains.

In fact, the application infrastructure's security is so strong that many advocates claim that hackers will never be able to break in. (Similar pronouncements have been made about other security checks in the past, it should be noted.)

One way the added security is accomplished is through the destruction of data silos, which could eliminate the need for middlemen, like banks, in the payment process; vendors and consumers could send their payments directly to their suppliers.

"We've seen some applications of blockchain in [enterprise resource plan-

ning], especially in the supply and distribution channels," says Denis Pombriant, founder and principal analyst at Beagle Research Group.

For example, blockchain could enable a jeweler to track a diamond from its mining to its eventual owner, thereby reducing the risk of illegal trafficking and fraud, according to Holden.

Blockchain could also help companies address privacy concerns. "CRM, similar to applications like Facebook, ingests all kinds of customer information," explains Abinash Tripathy, founder and chief strategy officer at Helpshift, a CRM supplier. As companies gain more information about consumers, concerns about how that information is used have increased.

"With blockchain, users gain self-sovereign identity," says Paul Tatro, cofounder of the Blockchain U Online, a training organization. "They gain control over how information about them is used rather than being at the mercy of their vendors. The consumers, not vendors, decide what qualities they do and do not want to reveal to others."

Blockchain technology also provides companies with new ways of interacting with customers. Tokens have been a key building block in applications like Bitcoin. New types of tokens can be created: Virtually any type of asset can be tokenized and customers offered various incentives. As a result, tokenization offers new ways to monetize customer transactions. "Customers can gain a stake by participating in various forms of feedback, like customer satisfaction surveys," says Paul Sebastien, chief marketing officer at Helpshift.

Large firms with multiple product lines can develop tokens for loyalty programs that span beyond one product line. Companies could even work together and pool their programs, issu-

"With blockchain, users gain self-sovereign identity."

ing loyalty tokens "that span across the entire industry rather than just one company," Tatro explains.

One company offering a unique spin on this theme is Howdoo, a start-up based in the Cayman Islands that just began offering a messaging and social media network that leverages blockchain. Howdoo provides a platform for consumers who are tired of being tracked, exploited, and bombarded by irrelevant marketing. It's a platform for content creators wanting to take back creative control and increase their earnings. And it's a platform for advertisers looking to gain greater transparency into their campaigns, connect with willing audiences, and protect their brand value.

Company founder David Brierley describes the platform as "a single application that combines all the best features of existing social media apps, but with a radical new approach to putting users, communities, content creators, and advertisers together in complete harmony and control, alongside a whole new way of incentivizing and rewarding contributions."



A key factor connected to Howdoo is the μ Doo token, a form of cryptocurrency that can be used to pay for digital products and services. Advertisers can use these tokens to buy the right to contact their target audiences or to reward consumers who engage with them; companies can use them to reward content creators for the ad revenue they generate; and network operators can be rewarded for good performance.

Even Cambridge Analytica, the U.K. political consulting firm which came under intense scrutiny after it improperly gained access to the personal data of roughly 87 million Facebook users in the years leading up to the 2016 U.S. presidential election, was reportedly looking at using blockchain technology to help people secure, manage, and monetize their online data.

ADDED TO ADVERTISING

And now a new project spearheaded by AdLedger, IBM, and Salon Media is looking to apply blockchain technology in advertising. Called the Campaign Reconciliation Project, it seeks to leverage a shared ledger to bring greater transparency and data security to advertising.

The project's goal is to alleviate long cycle times, manual reporting, and discrepancies across advertising networks. Blockchain will be used to record contractual conditions, publisher payments, and ad impressions. All data will be in a shared system of record that is immutable and fully auditable.

"This is not only a proof of concept for what blockchain is capable of, but how it can help companies make informed decisions about the rules and standards needed for a transparent, shared ledger," said Christiana Cacciapuoti, executive director of AdLedger, a consortium of companies—including GroupM, IAB, IBM, iSpot.tv, MAD Network, Publicis Media, and TEGNA—that have come together to reinvent the digital advertising ecosystem. "With the digital advertising industry plagued by fraud, transparency, and brand safety issues, we're using blockchain to indicate to everyone that there is light at the end of the tunnel."

What Is Blockchain?

Blockchain, which was invented in 2008 for use as a public transaction ledger in Bitcoin, takes a novel approach to data management. Rather than one entity controlling information, disparate nodes—none of which have absolute control of the data—have access to it.

A blockchain is a list of records, called blocks, that can grow organically. They are linked and secured by a special type of cryptography, a security mechanism. Each block typically contains a cryptographic hash of the previous block, a timestamp, and transaction data. This design makes it difficult for outsiders to modify the data. Once recorded, the data in any given block cannot be altered retroactively without altering all of the subsequent blocks.

Since there are so many blocks, many observers view the system as unhackable. Because of its strong security features, blockchains have many potential uses with confidential information: financial records, medical information, government records, identity management, and even voting.

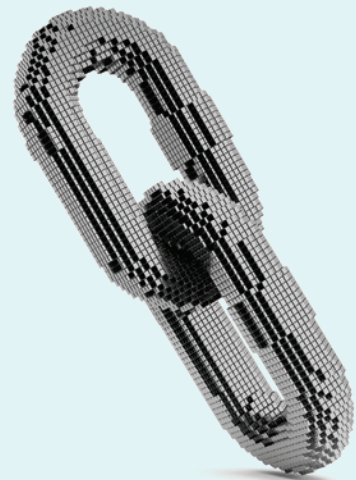
Chains can be built in two ways. They can be public and open to anyone with a network connection, much like a typical open-source model and the Internet. Bitcoin has taken that approach. In the other scenario, a chain can be closed and sold and supported, like enterprise software applications. Vendors now are building special-purpose enterprise blockchains.

In the past 10 years, blockchain technology has evolved in three phases. In the first phase, Bitcoin proved the concept and used it for its financial transfers.

The second phase added application logic and scripting features. Here, third parties, such as Ethereum, R3, and IBM, have been building special-purpose blockchains, or software modules geared to various functions. Traction for these types of applications has been building with smart contracts. For instance, a firm can create invoices that get paid automatically when shipments arrive, or share certificates that automatically send stockholders dividends if profits reach a certain level.

In the third phase, which is still under way, the technology will operate like an operating system, providing indexing and search capabilities.

With each new generation of solutions, blockchain technology becomes simpler to deploy. Its development has been moving at a quick pace. While a lot of progress has been made to date, much more work remains before blockchain becomes a simple plug-and-play solution, like mobile applications. —P.K.



Underpinning the project will be the IBM Blockchain Platform. IBM will also help establish the governance surrounding the consensus models or rules by which participants can write, access, and validate data.

"The digital advertising supply chain is notoriously broken. Dimes on the dollar

that are lost today can be traced back to issues with transparency and trust," said Chad Andrews, global solutions leader for advertising and blockchain at IBM, in a statement. "To effectively work together, marketers and publishers need to know how media is purchased, how

it's being delivered, and that payment is being made. Blockchain can restore confidence in digital advertising and help advertising dollars go further by creating greater transparency, providing a single source of truth across all members of the supply chain."

But blockchain's benefits in CRM go far beyond advertising.

As the quality of data insights across customer-related activities typically improves with scale, blockchain's network architecture eliminates the need for an intermediary data manager. Such a system could provide multiple

businesses, and their competitors, with deep insights into customers' preferences, opinions, and buying habits.

Because of its potential, many firms have started to dabble with blockchain technology. A full 39 percent of companies, including 56 percent of those with more than 20,000 employees, are either in the process of deploying blockchain solutions or are considering them, according to a report from Juniper Research. Of the use cases, nearly one-third of respondents identified settlements and payments as their top area of focus, while 10 percent identified

smart contracts and another 10 percent pointed to supply chain management.

BLOCKCHAIN'S CHALLENGES

But blockchain technology has many hurdles to clear before it becomes widely adopted. Many companies are worried about how blockchain might disrupt their existing internal systems. More than half (59 percent) expressed concerns about interoperability that could ultimately lead to lost business, and 42 percent thought that the reluctance or refusal of clients and partners to deploy blockchain technologies downstream might cause difficulties for them, according to Juniper Research.

For now, such concerns seem warranted. What the dabblers find is an embryonic technology. "Blockchain today resembles the early days of the Internet," notes Helpshift's Sebastien.

While blockchain has a great deal of potential, the technology has little to no support infrastructure. Consequently, building blockchain applications is a time-consuming, tedious task, one where high levels of obscure programming expertise are needed. Third parties can often create mobile applications in a day, but building blockchain solutions requires much more time because few of the underlying functions, such as the code needed to connect two nodes via a network, are available.

Currently, the individuals dabbling with such issues are largely programming geeks. A Deloitte study examined the evolution of a blockchain ecosystem dubbed GitHub, a global software collaboration platform. On the plus side, the project attracted 24 million participants who started more than 68 million projects. But the stark reality of these open-source initiatives is that most have been abandoned or have not yet achieved meaningful scale. Only 8 percent of GitHub projects are considered active, meaning that they have been updated at least once in the past six months.

So, blockchain supporters need to build up its ecosystem and develop tools and applications for various niches, like CRM. There are signs that such work is

An Unsolved Mystery: Who Built Blockchain?

Normally, the individuals who create industry-changing technology, like Microsoft's Bill Gates, Apple's Steve Jobs, and Facebook's Mark Zuckerberg, quickly become celebrities. Not so with blockchain.

Satoshi Nakamoto is the name used by the unknown person or group of people who designed blockchain and Bitcoin. To date, the work has been distributed on open-source websites, and the creator(s) have masked their identities. In October 2008, they released a whitepaper, "Bitcoin: A Peer-to-Peer Electronic Cash System," on a cryptography mailing list at metzdowd.com. In January 2009, they launched the first release of Bitcoin software on Sourceforge, an open-source platform.

The mystery developer then created a website with the domain name bitcoin.org and collaborated with other programmers on Bitcoin software design until the middle of 2010. At that time, the work was handed over to one contributor, Gavin Andresen, who became the lead developer. Two years later, Andresen founded the Bitcoin Foundation to support and nurture the development of the virtual currency, and in 2014 that work became his full-time job.

Nakamoto's identity has continued to be shrouded in mystery. Initially, the developer claimed to be a Japanese programmer, but few think the pen name is real. Speculation has circulated around half a dozen high-profile software industry executives as the original blockchain designer. Others think the work came from a nation state, such as China.

As Bitcoin has gained traction, the shares and value of Nakamoto's stake in the venture have grown. In December 2017, it was worth \$19 billion, placing him among the world's top 50 wealthiest executives. So when the mystery identity is finally revealed, those responsible will receive a huge payday, not to mention a few requests to explain why they remained anonymous for so long. —P.K.






under way. At Salesforce.com's recent TrailheadDX conference in San Francisco, the company's cofounder, CEO, and chairman, Marc Benioff, said that Salesforce is working on blockchain but didn't elaborate on which part of the

Another challenge for vendors, like Salesforce, is a lack of individuals with the needed skills. Because blockchain solutions are new, few programmers are familiar with the technology, and those who have experience are in high demand

technology? Observers recommend that businesses pay close attention to blockchain because, eventually, it should be incorporated into CRM applications and dramatically change how these solutions are built.

Given the present infrastructure immaturity, businesses should start small. "Companies should begin dabbling with blockchain and start skunkworks projects just to gain some exposure to it," Tatro recommends.

After all, expectations are that in the coming months and years, the missing holes will be filled, so organizations will be able to build, deploy, manage, and secure next-generation blockchain CRM applications in due time. 

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"Blockchain today resembles the early days of the Internet."

product suite would get the company's early attention or how the technology would be used.

But businesses aren't looking to Salesforce as their first choice for such technological innovations. In Juniper Research's study, 43 percent of businesses were looking to work with IBM as their preferred blockchain partner (the Campaign Reconciliation Project provides a ready example); another 20 percent had Microsoft in mind.

and command very high salaries. A quick survey on Indeed.com listed more than 1,400 open blockchain developer positions, and the bulk (960 of them) pay \$100,000 or more per year.

Not only are developers scarce but so are all of the other amenities found with commercial solutions: programming tools, management systems, training companies, certification programs, and standards.

Given, the large number of missing pieces, how should firms treat the

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—Kirkus Reviews

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

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How to Get Lasting Benefits from **Temporary Employees**

AS TEMP WORKERS BECOME PERMANENT FIXTURES IN CONTACT CENTERS, HOW YOU TREAT THEM MATTERS | By Sam Del Rowe



Hiring temporary workers for spikes in contact center demand is common. Companies across industries do so during the summer when permanent employees take time off, during the busy holiday season, or in response to large-scale marketing campaigns. Yet the practice is not without its challenges, and many companies struggle with evaluating temporary employees during the hiring process and ensuring that they demonstrate the same level of commitment as permanent ones. To make the most of situations involving temps, companies need to look inward and adopt several practices.



THE HIRING PROCESS

Experts agree that before jumping into the hiring process, organizations must have a clear idea of what makes a strong contact center agent, regardless of whether an employee will be hired permanently or for only a short time. Cameron Smith, senior global director of product management–workforce engagement management at Genesys, suggests that one way to determine the ideal agent is by thoroughly evaluating current employees. This, he says, “can give some great insight into what determining factors can and should be targeted when recruiting any type of future employee.”

Smith notes, however, that the process is complex due to the many variables—such as education, location, and previous work history—that can affect employee performance.

Companies need to know that any employee hired **“will be able to handle the volume, potential issues and, ultimately, succeed in the role.”**

Fara Haron, CEO of CRM for North America and the Philippines at Arvato, a contact center outsourcing services provider, agrees that “it’s important to keep the desired skill set in mind and make sure you’re screening and testing, whether in-house or through a staffing agency.” She says that while companies should be looking for traits such as good communication skills, computer navigation, data entry skills, and empathy, other factors were important as well. “Especially in a temporary role, companies should identify candidates who are nimble, resilient, and also express a desire to stay with a company long term and eventually become a full-time employee.”

Other experts also assert that companies need to look beyond the traditional elements. Beth Cabrera, executive vice president at KNF&T Staffing Resources, a Boston-based temp agency and staffing company, says that rather than focusing on direct call center experience, companies should instead look for candidates with work experience that draws on similar skills or backgrounds. Examples of this, she says, include retail experience in a high-volume store, telemarketing, or fundraising.

Once companies have identified the candidates they want to screen, Cabrera says, they should “heavily rely upon behavior interviewing” to ensure

that candidates understand the nature of the tasks they will be asked to perform and what is expected of them. Companies need to know that any employee hired “will be able to handle the volume, potential issues and, ultimately, succeed in the role,” she says.

For Steve Kraus, vice president of marketing at Cogito, a provider of real-time emotional intelligence software, the most important skill for temp workers in the call center is emotional intelligence, which he says involves the ability to “recognize the signals being communicated by the customer and respond with the proper levels of empathy.”

“As temp workers are learning so many things in a short period of time, it is important they know how to engender trust with the customer and how to leave the customer feeling as if the company they are working with is committed to a high-quality experience. So much of that trust is built on how they are speaking, not just the facts they are communicating,” he says.

To evaluate these skills, Kraus recommends setting up a similar environment to the one in which candidates would be working to see how they function in that environment.

John Loughlin, senior director of client solutions and delivery at HighPoint Global, a company that offers training, content development, contact center optimization, and quality assurance services to government agencies, asserts that the goal with hiring temps should be “to attract and keep great candidates.” The benefits of going the temp route include flexibility and the ability to try out workers before committing to a long-term hire, though he adds that it typically takes about two months to fully train a temp.

A critical part of the hiring process should include temp candidates sitting side by side with current employees to see how the contact center works, Loughlin says. This would also give companies the opportunity to track the questions the candidate asks their prospective colleagues. Candidates in the side-by-side process will often ask the full-time employee how quickly they can get off the phones and into a different role, which Loughlin identifies as an immediate “red flag” indicating that the temp prospect is not invested for the long term.

Randi Busse, founder and president of Workforce Development Group, a training and coaching organization that focuses on improving the customer experience, emphasizes the interview in determining a potential temp worker’s commitment level. She notes that some people might say one thing to pass the interview only to adopt a more laissez-faire attitude once they are hired. They can get in the



habit of thinking, “Oh, I don’t have to be nice anymore; I can kind of let my guard down.”

To combat this, she suggests asking “situational-type questions.” As an example, a hiring manager might ask for details about the best customer service experience the candidate ever had, the worst customer service experience that person ever had, and what specifically made either experience good or bad.

“Try and gauge [whether] they even know what a great customer service experience looks like,” Busse continues. “The mistake that a lot of companies make is when they hire people, they teach them about the computer system, about the products and service that they offer, but they don’t necessarily talk about the importance of the customer, what the value of the customer is and how they as a company want to treat their customers.”

To attract the highest-quality temps, Kraus says, companies “need to create an environment in which temp workers feel supported by their managers, [and] have transparent, achievable performance goals and related measurement.” Additionally, temps “must feel they are part of a mission in which the specific work they are doing is contributing to a greater goal.” And so their goals feel achievable, temps “must be given tools that are intuitive to learn and easy to use,” he adds.

While some might argue that these practices are not as relevant for temp workers, who might just be passing through, Kraus argues that in fact “it is even more important with temp workers. The company has such a short time to build the relationship with the temp worker, and temp workers now have a platform—social media—by which to build up the company’s reputation or break it down. Since the companies that leverage temp workers typically do it year after year, it is key [that] they build up a strong reputation for being an organization that is good to work for.”

Loughlin adds that while attracting the best temps is difficult, “the bigger challenge is keeping the great employees.” He says that companies’ reputations are important in shaping the types of applicants they attract. “If a company’s reputation is that they only hire the best employees, often only the best will apply.”

For this reason, he says, companies need to demonstrate that they are willing to invest in employee development and deliver meaningful work.

Cabrera notes that employees today are seeking positions that offer flexibility with scheduling, working remotely, paid time off, or even the work responsibilities themselves. As such, good

temporary employees might be drawn to one company or another by what they will learn in the position, how it will help them get their next position, and whether the position can lead to a full-time role within the company.

Busse agrees that having a work-at-home option is a good way to drive commitment. “People that work at home—because they’re so grateful to have a work-at-home experience and opportunity—typically take their job more seriously,” she says.

WHERE TO LOOK

Busse suggests a number of pools from which companies can pull temp employees. One of these is the company’s customer base. “If I’m an advocate of your brand to begin with because I like what you do, I like the way you treat me, I like your product, who better to epitomize the brand?” she asks. “Tap into your customer base, because they already love you. You don’t have to sell them on the company.”

A related option is to inquire among current employees. “If you’ve got employees that are engaged and committed, go to those people and ask, ‘Do you know somebody who might be looking [for a temp position]?’ Tap into the brand advocates that are in your company, because if you’re a good employee and you have a good work ethic, chances are that the people you associate with are like you.”

“Try and gauge [whether] they even know **what a great customer service experience looks like.**”

HOW TO TREAT TEMPS ONCE THEY’RE HIRED

Experts agree that companies would do well to generally treat temps as they would full-time employees. However, they should still adopt specific practices that support temp labor.

“To motivate temp workers to give the same level of commitment as full-time employees, companies need to invest in those workers and design processes and provide systems tailored to the temp workers’ tenure,” Kraus says.

He goes on to say that companies often take one of two paths with temps: They either attempt to treat them exactly like full-time employees or they “do the complete opposite” and treat them as a “necessary evil,” not providing them with any of the necessary support and motivation.



Both of these are poor choices, Kraus says. Companies should instead adopt a number of practices that focus specifically on the needs of temp workers. These include designing on-boarding and training processes that “fit the temp workers’ limited tenure”; treating them “as important as full-time workers”; and establishing performance goals that “motivate them to perform and be engaged during their tenure.”

Companies should also “make the effort to communicate and involve temp workers in the overall mission of the company” and evaluate work assigned to temps “to ensure that they are likely to succeed and understand how to achieve their goals,” he adds.

Once they are brought on board, it’s important to continue “soft skill” development, working on interpersonal skills such as being a good listener and

to ensure that they are committed, to proactively identify any concerns, or to find creative ways to ensure that these temporary employees are there for the long haul,” she says. “The agency can work with the company to ensure that there are appropriate motivators in place that mirror [those of] full-time employees.”

As all these measures make clear, employee performance is not just the responsibility of the employee—Smith notes that work duties, work environment, the supervisor, and the processes in place “all play an active part in how the employee performs.” In particular, he says that the supervisor “must exercise a reasonable degree of control, assign appropriate responsibilities, allocate adequate time to fulfill responsibilities, and be held accountable for employee performance.”

Smith also outlines a number of best practices for retaining temps. These include developing skills to prepare them for bigger roles; emphasizing the value of the current role, even if it’s a temp position; providing tools to help them evolve and perform at their highest levels; setting achievable goals; offering a variety of career paths; and ensuring that leadership remains engaged.

“Due to the seasonality of many businesses, temp workers play a critical role as the interface between a company and their customers.”

having empathy, qualities that Kraus says are often overlooked yet critical to their success. “While in the past companies often believed that temp workers either had good soft skills or did not, it has become more of a gray area. Now there are training techniques and tools that can help guide agents’ soft skills, enhancing their chance at success, increasing their job satisfaction, and leading to a positive impact on the customer,” he says.

Haron agrees that companies should make their workplaces as hospitable as possible for temp workers, even offering them incentives, such as bonuses, from time to time. Doing so “will make them feel loyal and see the company as an employer of choice, where they want to stay,” she says.

And to that end, Haron also recommends that companies transition temporary workers to full-time positions whenever possible to “provide stability and security” in their workforces.

Alternatively, Cabrera says that companies should view the temp agencies they use as strategic partners and leave a lot of the motivational work to them. “It is the agency’s responsibility to ensure that they are communicating with their temporary employees


GOING FORWARD WITH TEMPS

Experts agree that temp positions will continue to be an important part of contact center strategies going forward. “Due to the seasonality of many businesses, temp workers play a critical role as the interface between a company and their customers, and often play that role at moments of truth that greatly impact the relationship [between the company and its customers],” Kraus says.

A big part of this involves giving consideration to what motivates temp workers and what makes them successful, he adds.

Then, companies must put the procedures, measurement, and tools in place to support the temp workers’ shorter, high-impact tenure, consider the skills that make temp workers succeed or fail, and train and support them in developing and displaying those skills.

“Companies that do this well will not only have skilled temp workers that return year after year,” he says, “but they will also have temp workers that advocate not only to other temp workers but to customers of the brand.”

And that’s the kind of worker any business wants, no matter how long they are on the payroll. 

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With Interactive Marketing, Digital Outreach Becomes Bidirectional

Companies can better respond to customer clicks and contacts to deliver more appealing offers in real time

>>> By Mary Shacklett

It's been a staple of the fast food industry for years. Say a customer were to walk into a McDonald's and order a Big Mac; the cashier would instinctively ask, "Would you like fries with that?" That one request by the customer automatically triggers a response that often leads to an upsell. If the customer answers, "Sure," and orders a medium fries, his order value just increased by \$1.79. Now throw in an offer for a medium Coke as well and his total order goes from \$3.99 for the Big Mac alone to more than \$7.

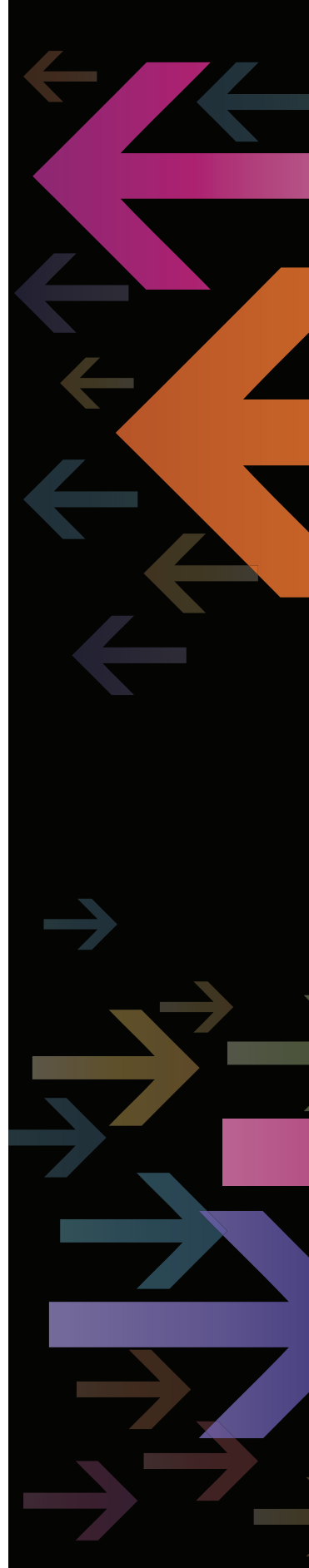
In asking that one simple question, the pimply-faced, minimum-wage-earning teenager behind the counter at McDonald's just engaged in a rudimentary form of a very specialized kind of marketing in which offers are tailored in direct response to something the consumer does.

Called interactive marketing, this approach goes a lot further than the McDonald's scenario; think of it as trigger-based or event-based marketing, powered by sophisticated analytics, artificial intelligence, and machine learning, with a bidirectional twist.

"Interactive marketing is the ability to ensure not only that the customer is engaged with you, but to assure the customer that you heard him. It is actively and continuously helping the customer meet his goals," says Kyle Christensen, vice president of product innovation at Katabat, a customer experience management software provider.

Interactive marketing is a new stage of customer engagement that goes beyond the boundaries of personalized marketing.

"With personalized marketing, companies gathered information about the customer, knew what he or she was likely to be interested in from past buying, and made offers, but the communications between the company and the customer were entirely one-sided," Christensen says. "With interactive marketing, the customer and the company remain engaged throughout marketing, sales, order fulfillment, and service. The continuous communications come in from all sides."







HOW IT WORKS

When companies use interactive marketing, the relationship between customers and marketing never ends. Customers also remain continuously connected to sales, service, and any other company function that is customer-facing.

Interactive marketing can occur on any channel through which the customer engages. On a website, it is likely to manifest through content that is relevant to each specific customer based on that customer's most recent interactions with the company. If the customer engages with the company via email or text, she receives responses that are directly relevant in real time to what she is requesting. If the customer visits a brick-and-mortar store, he is face-to-face with the company, and the sales clerk also has a system that alerts her to items in which the customer expressed an interest.

“Interactive marketing is contact that is happening between the company and a customer in real time based on what the customer is doing.”

“Interactive marketing is contact that is happening between the company and a customer in real time based on what the customer is doing,” Christensen says. “It is not just the customer clicking on buttons and answering questions. With an SMS messaging system, the customer actually tells you flat-out what he is interested in.”

And though it hasn't reached this level yet, Christensen expects that in the next two years, with the improvement of language recognition algorithms, interactive marketing will be able to use natural language processing (NLP) to accept spoken responses.

To maintain continuous and engaging conversations with customers, it's vitally important to place the right content in front of them. This can be done by using content management systems that track

each customer's journey with the company and display the content most relevant to them in context. However, to get to this point, most companies will need to reconstruct their content. Too many online shopping websites overdo it with content, displaying reams of products, photos, videos, and more to the point where the customer tires of trying to wade through all of the choices. In other cases, companies display all sorts of information on various subjects on their websites, but not all customers are interested in it.

Consequently, many companies now face the formidable task of having to restructure their web content for relevance to each individual customer. Companies also grapple with realigning their marketing, sales, and customer service functions so that these departments continue to flow interactively around each customer throughout his journey

with them. This is especially true for marketing, sales, and customer service, which have gotten used to operating in silos and just handing the customer off to one another and then moving on.

THE CUSTOMER'S ROLE

Even more transformational—and challenging—for companies is how customers' roles have changed in the marketing and sales process.

“The Internet has created a power shift to where the buyer now has total control of an interaction with a company,” says Kevin Joyce, chief marketing officer at the Pedowitz Group, a marketing consultancy. “If the buyer goes online, 60 percent to 70 percent of the buying process is over before he even engages with a salesperson. Before, the buyer would go to the salesperson to get information about a

product, and the salesperson would be in a position to handle objections. For this reason, marketing has to remain engaged with the buyer longer than it has in the past. It just can't hand over a potential customer to sales once marketing has launched a campaign and gets leads. This is why we call this new process of continuous engagement with the customer by everyone in a corporate customer-facing function interactive marketing.”

Christensen, who has a background in banking, illustrated how interactive marketing might work with a homeowner shopping for a loan: The loan officer sees that the customer is eligible for three types of loans, but based on the customer's borrowing history and profit potential, the officer presents only a home equity loan. The customer isn't interested in that loan choice and instead tells the bank employee what he wants and what he can afford. Based on that, the loan officer sees that the customer also qualifies for a riskier jumbo loan. He is firmly behind the home equity loan, which poses the least risk for the bank, but the customer insists on the jumbo loan. The bank reluctantly gives in and sets him up with a jumbo loan.

“This level of interactive marketing wish fulfillment forces the bank to accept a higher level of risk than it is comfortable with,” Christensen relates.

In this form of marketing, the customer truly is king because he controls the sales process. The rule of thumb is that you go along with him, even though (in the case of the bank) your risk managers and loan underwriters are uneasy.

But do you always have to go along with the customer, no matter how risky the path might be? Not necessarily. A store might even be well-served by referring a client to a competitor that can provide a specific product it doesn't carry.

“When this happens, marketing should remember that its job is to stay on top of customer needs and to help sales sell more,” Joyce says. “This means that you must develop a healthy pipeline of customers and adapt your marketing and messaging so that you continuously engage with people and provide them



with good information, whether they buy from you or not. If marketing effectively contributes to customer engagement, it will generate more meaningful conversations, stay with customers throughout their journeys, meet customers on the level of their needs, and sell more.”

THE BEST CHANNELS

To continuously interact with customers and meet them on their level, Joyce recommends that companies begin by revisiting their websites.

“Most companies will find that their websites are product-centric when they should be customer-centric,” he says. “To move websites toward a customer-centric position, content has to be interactive so it can be rendered relevant for every customer.”

The problem is that many companies might be tempted to stop there.

Instead, companies should be focusing on the overall omnichannel customer experience when they engage in interactive marketing.

“There are now more advanced interactive marketing channels than ever,” Christensen says. “Two-way SMS text messaging has tremendous potential. Voice and face-to-face communications are also channels that companies overlook when it comes to engaging with their customers.”

Video, chat, email, and others also come into play. Even bots are being repurposed for effective deployment in interactive marketing.

“There was an initial bot craze, which frankly failed,” Christensen says. “The problem with bots was that you couldn’t deliver an effective online response to the customer.”

But that’s changing now. “In the next 12 months, we will see call center agent-facing bots that will coach the agent while she is on the phone with the customer,” he predicts. “The bot will present the agent with offers that she should present to the customer based upon the customer’s past and present experiences. Presenting an offer that is relevant to the customer now is integral to interactive marketing.”

BEST PRACTICES FOR INTERACTIVE MARKETING

Interactive marketing assumes its own shape for every company, because each company engages with customers on different channels; some might even require strategies that touch customers on all channels.

However, regardless of an individual company’s situation, there are several best practices that can help with all interactive marketing efforts:

>>> 1. Learn now. Seminars, articles, vendor demos, and other companies already doing interactive marketing can all help educate you on how the approach can work for your company and what tools you need to carry it out. The time is now for managers to get up to speed with what’s available.

>>> 2. Assess your readiness for interactive marketing. “Marketing and other departments connected to the customer must be adaptive, but before you can adapt, you need to know what your destination is and how you are going to get there,” says Kevin Joyce, chief marketing officer at the Pedowitz Group. This step in the process should involve a thorough evaluation of the processes, data, people, and infrastructure the company has in place.

>>> 3. Develop a customer-centric organization. If you haven’t been customer-centric, start now. This will likely require convincing the CEO because commitment to the concept must start at the top.

>>> 4. Don’t get enamored by technology. “Avoid the shiny objects syndrome that can attract you to technologies that might not meet your needs,” Joyce says. “Instead, focus on what you need and design the metrics you want to measure your progress against.”

>>> 5. Find a vendor that will be a long-term business partner. Vendors are focused on selling, so plan to interview potential vendors thoroughly and then narrow your discussions down to those that will stick with you through your entire journey. Customers and business conditions are constantly changing. You want to seek out vendors that are responsive to changing conditions, to how they impact your business, and to what you need to do to adapt.


DOES IT REALLY WORK?

In the McDonald’s case, interactive marketing nearly doubled the customer’s order size. In real-world examples using more sophisticated technology, the sales bump can be even more dramatic. “One of our customers increased revenue five to seven times by actively focusing on face-to-face as well as voice interactive marketing,” Christensen boasts. “Another focused on more interactive content and saw a 40 percent rise in conversion rate.”

So what about companies that have lagged in interactive marketing?

“Millennials have transformed interactive marketing. Because they grew up with interactive engagement and social media, they expect an interactive

exchange all of the time,” Christensen says. “Given this scenario, the real risk for companies is what [happens] by not doing interactive marketing?”

“If you don’t get started with a new technology that can make a difference for your business now, you could risk being as much as a decade behind those who do start,” he cautions. “The companies that have implemented interactive marketing are starting to see quicker paths to revenue. Those who aren’t doing it risk losing out to competitors.” 

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REAL PRO

Helpshift Makes an Impression for Chatbooks

Chatbooks, which transforms digital pictures into physical photo books, transformed its customer service with Helpshift

Chatbooks provides a mobile app that converts customers' digital pictures into physical photo books. Founded in 2014, the company, which is based in Provo, Utah, today has more than 1 million customers and 170 employees, nearly half of whom work on its customer service team.

"What we like to say is Chatbooks is like a subscription to your life," explains Angel Brockbank, director of support at Chatbooks. "It automatically takes pictures from whatever source you connect it to, whether it be Facebook or Instagram or your iPhone...and every 60 pictures that are loaded from that source [are loaded into] a book that automatically gets sent to you."

"The idea for Chatbooks is really that we want to help people hold on to what matters, and we feel like everything is in the cloud nowadays. It helps...for people to be able to hold it physically and be able to recall those important memories in their lives," she adds.

Having previously relied solely on email for customer support inquiries, Chatbooks realized that it needed to meet its customers on their channel of choice. This was especially apparent during the holidays, when the company received four times the usual number of support tickets. With this in mind, the company turned to Helpshift, a customer service platform that, according

to its website, aims to "bridge the disconnect between conventional customer service channels like email and phone support and a growing consumer base that lives in a mobile-first, messaging-based world."

Chatbooks implemented a number of Helpshift capabilities, including live chat, chatbots, and automated routing and ticket assignment. The 70 agents, many of whom work from home, can now respond to customers via email, chat, and the mobile app. Agents can work from a single dashboard and respond to those different channels quicker than ever before, thanks in large part to the chatbot, which is used to collect customer details and a description of the issue before an agent ever gets involved in the conversation. The chatbot's data collection is also helpful because if a call gets disconnected, the agent has all the information he needs to follow up with the customer.

Equipped with these features, Chatbooks has been able to resolve more than 30 percent more tickets per hour, decrease its average time to response by more than 75 percent, and increase its customer satisfaction score (CSAT) from 4.6 to 4.8 on a five-point scale while simultaneously supporting a growing customer base.

Helpshift also powers the FAQ portion of Chatbooks' website.

Brockbank praises the live chat



functionality in particular. "Our average time for a first response was 18 hours prior to our live chat implementation with Helpshift," she says. "As soon as we enabled that feature, it went down from 18 hours to four hours on average."

"Our customers are a lot happier with the live chat feature and being able to interact on live chat versus waiting for email, and my team is a lot happier as well because they're able to finish issues immediately with one conversation rather than going back and forth with the customer waiting for a response."

And in the event that agents cannot get an issue resolved immediately, they can leave notes within the ticket so the next agent or supervisor can pick up right where the previous agent left off.

Helpshift has also led to an increase in agent productivity and a higher conversion rate. —Sam Del Rowe

the payoff

SINCE IMPLEMENTING HELPSHIFT, CHATBOOKS HAS BEEN ABLE TO DO THE FOLLOWING:

- increase its tickets resolved per hour by more than 30 percent;
- decrease its average time to response by more than 75 percent, from 18 hours to four hours; and
- increase its customer satisfaction score from 4.6 to 4.8.



HubSpot Helps Eventige Book Business Fast

The marketing agency now grows brands while growing its own revenue streams

Eventige Media Group, a full-service digital marketing and advertising agency based in New York and North Carolina, wasn't getting to qualified leads quickly enough and was wasting time on unqualified leads.

"We were having an overwhelming number of leads come in and saw the quality of the response rate was declining; we were not properly managing the promise to our customers," explains Roman Rabinovich, the company's vice president of business development.

With so many leads coming in, it was critical that Eventige respond quickly to the best prospects and not waste time on those companies too small to be good clients. The company started to develop CRM apps to script emails and to connect with project management and accounting software in an attempt to address these issues.

Even though the self-developed applications automated some CRM capabilities, they were still far too slow, according to Rabinovich. "It was taking minutes at a time, and that was unacceptable," he says.

While minutes might not seem long to some, in the highly competitive, fast-moving marketing and advertising space, that lag time was costing Eventige money.

It's a highly competitive industry, and if a firm doesn't respond within the first five minutes, the chances of closing the sale go down precipitously, Rabinovich says. "They are shopping for a service. Our goal is to get them to stop shopping. If they don't get an answer, they will contact a competitor.

"The ability to delight someone in the first five minutes is priceless. They feel the quality of the service through the promptness of your offering," he adds.

Eventige officials saw quickly that another solution was needed. The agency found what it wanted in HubSpot.

"It had the automation and workflow that we wanted," Rabinovich says. "It allows us to be less focused on the CRM and more focused on the customer. We're here to achieve a goal—servicing our customers. Tech is just there to help us achieve our goal. If we can automate the administrative tasks, it frees up our time to spend on revenue generation."

Eventige customers also prefer to get immediately down to business rather than spending time on a call providing detailed company information that the Eventige marketer then has to enter into the system.

As they did under the old system, customers initially contact Eventige via its website, but now they fill out a form with company information that HubSpot reads and converts to connections in the project management, accounting, and calendar system if a customer is "qualified."

Prospects without their own email domains and those with only limited marketing budgets aren't good fits, so they are automatically rejected, Rabinovich says. Some companies might have a small marketing budget for a three-month project, but Eventige looks for customers with marketing budgets to sustain campaigns of six months or longer.

Even though the implementation of HubSpot didn't occur until March, the results have been dramatic, according to Rabinovich.

Thanks to the more efficient calendar system, appointments with prospects have jumped 30 percent. By eliminating unqualified prospects at the outset rather than spending time on the phone only to find them unsuitable, Eventige saves about three hours a day. And with more appointments and less wasted time, revenue has grown 20 percent.

"The next steps are to make HubSpot's CRM the core of our marketing and sales operation," Rabinovich says. "The CRM will allow us to connect our content strategy, social media marketing, and email marketing activities into the HubSpot ecosystem. This will allow us to save even more time in the future because we will be using one centralized tool for all marketing and sales activities while eliminating the stand-alone tools that have previously created inefficiencies." —Phillip Britt

the payoff

SINCE IMPLEMENTING HUBSPOT CRM, EVENTIGE HAS SEEN THE FOLLOWING RESULTS:

- appointment bookings increase by 30 percent;
- revenue increase by 20 percent; and
- three hours of rep time saved per day.



By IAN JACOBS

The LAST LINE

The Dawning of a New Era in CRM (Magazine)

‘Willkommen, bienvenue, welcome...fremde, etranger, stranger!’

AS REGULAR READERS of this back page probably already know, Marshall Lager has ridden off into the sunset. (Collective moment of silence.) In my mind, I picture him riding a Big Wheel and blowing raspberries at us—maybe that’s just me? Marshall provided us with more than a decade of laughs, groans (many, many groans), and a boatload of insight. But all good things—and Marshall’s column—must come to an end.

So, what’s next for this august back page? Well, me. Although I’ve been a presence as a columnist in the inside pages of this magazine since 2006, I now get to take pride of place. Or last place. Or something like that. Whatever this place is called, I’m here now.

So, who the heck am I? In my day job, I am a principal analyst at Forrester Research. For the most part, I help our customers move toward a digital-first approach to customer service. For the past almost two years, much of my time has been taken up with research and consulting around chatbots, virtual assistants, artificial intelligence, natural language understanding, and machine learning technology, processes, and best practices. I’m obsessed with the rising import of agent experience in a world where automation starts to gobble up most of the simple customer interactions. And I work hard to convince our clients that their customers don’t want conversations; they want simple, emotionally satisfying resolutions, just as they have always done.


Outside of my day job, I’m a San Franciscan, a beer and wine snob (I mean I have to have *something* in common with Marshall!), a lover of the arcane, a geek of many stripes, and a voracious reader. I love TV shows prominently featuring small kick-ass blond women who toss off snappy comebacks every two seconds. In my world, there is a straight through-line from

Buffy the Vampire Slayer to *Veronica Mars* to *iZombie*. I used to be a reggae DJ at a San Francisco nightclub, but that was back in the days when staying out until 3 a.m. on a Sunday night didn’t cause me to inevitably miss work the next day. I have lived in many places that start with the letter B: Budapest, Bangkok, Brooklyn, the Bay Area, da ‘Burgh (OK, that last one is a stretch). And a great weekend for me involves getting a slight sunburn while hiking 10 miles on the ridge of the Santa Cruz Mountains—or just drinking some lovely cabernet sauvignon somewhere in the Sonoma Valley.



Many of those catholic interests are likely to make appearances here. While there is no central theme to this column, it’s a good bet we’ll be discussing a lot of customer service and customer interaction topics. I will likely be less snarky than Marshall was; instead of cracking wise, I tend to look at the foibles of brands and heave a huge sigh, almost like I’ve been holding my breath waiting for the inevitable disappointment. I’ll leave the humor to the funny folks. One of the things I have learned over my 16 years as an analyst: There are

always more bad customer experiences ahead. As much as we improve in this industry we call CRM, someone somewhere is bound to screw it up for their customers somehow. That said, I also won’t be a gloomy Eeyore type. I hope.

I can promise you that, like the subhead for this month’s entry, every column will start with a quotation of lyrics from some song or another (nothing new here—after all, three of my first columns for the magazine were titled “Hell’s Bells,” “We Can’t Rewind, We’ve Gone Too Far,” and “Across the Universe”). Once a DJ, always a DJ? I’m here taking requests. 

Ian Jacobs is a principal analyst at Forrester Research. For more about Ian, see above.

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