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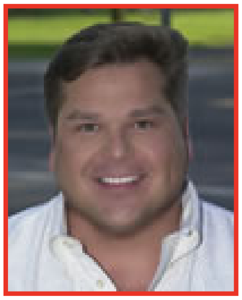

Improving Service by Leveraging the 360° View of the Customer

By John Ragsdale, VP of Research, SSPA

July's Topic of the Month for SSPA Research is the 360° View. When asked last month which title you would most like to see addressed in this month's SSPA News, the winner was "How to leverage the 360° view to improve customer service."

Defining the 360° View

To those of you new to Customer Relationship Management (CRM), the term "360° View" is used to describe how CRM constructs a total picture of the customer. In theory, every piece of information pertaining to customers is either written to the CRM customer record, or is integrated to the CRM system so the data is visible when the customer record is viewed. Typically, a 360° view contains the following:

- **Front office interactions.** Every interaction with the customer is captured, including all inbound and outbound phone calls, emails, chats, etc. This includes more than just customer service interactions; all sales calls and visits and marketing ads and promotions are tracked as well.
- **Back office interactions.** To supplement front office interactions, back office transactions are also included in customer history, including billing and payment history, and all purchases and order history.
- **Account relationship details.** CRM systems track a lot of meta data about customers as well, including demographics, preferences, relationship information (reporting structure, influence, key relationships inside and outside the company), technology environment details, and any other information gathered about the customer.

With a 360° view in place, every interaction with the customer can be in context of every other interaction, providing more accurate, personalized, and profitable sales, marketing and service communications.

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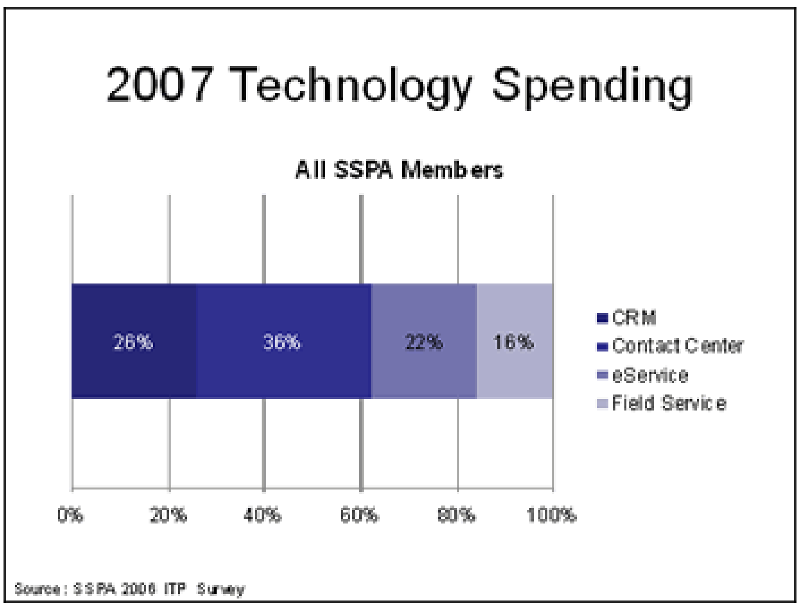
SSPA Member Adoption of the 360° View

The early adopters of CRM technology were largely in the financial services and communications industry, in which massive stores of customer information already existed. The technology industry has also been a major buyer of CRM software, though implementations are often siloed, with different CRM products used by service, sales and marketing divisions, and little or no integration between the disparate systems to create a true 360° view.

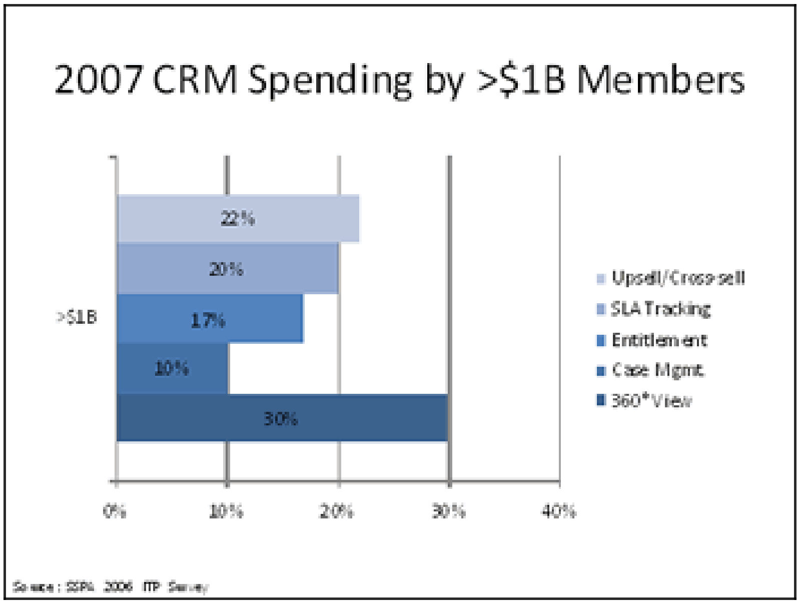
However, survey data shows that SSPA members are now making the 360° view a priority. According to the SSPA 2006 Member Technology Survey, of the 2007 planned spending on new service and support technology, members allocated 26% for CRM.

Figure 1: 2007 Planned Service and Support Spending by Technology Category



As seen in Figure 2, when asked for which area of CRM budgets were allocated, the largest percentage, 30%, was earmarked for the 360° view. Upsell/Cross-sell and SLA tracking also placed well, with 20% or more of planned spending.

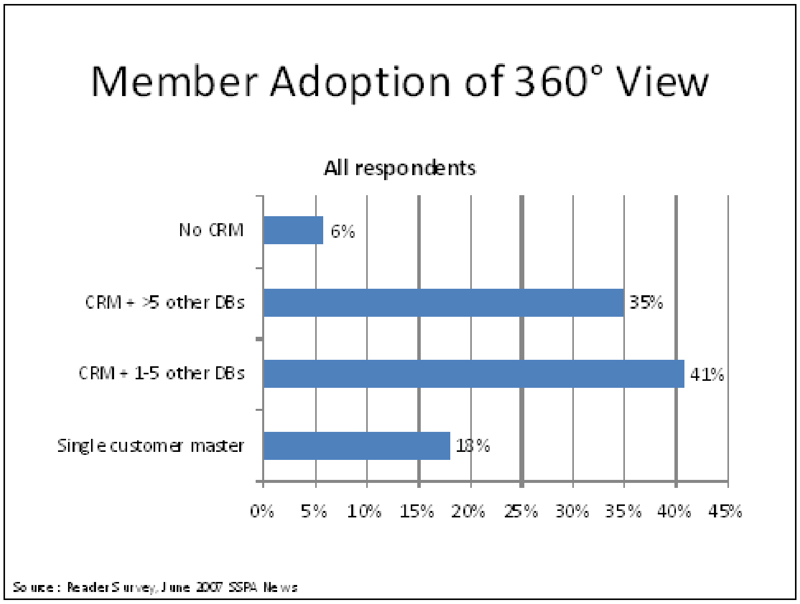
Figure 2: 2007 CRM Spending by >$1B Members



How then are members progressing in creating a 360° view? In the June issue of the SSPA News, readers were asked where their company was in creating a single, master view of the customer. Survey choices were:

- **Single customer master.** We have a CRM system serving as the "customer master," and all information, orders, and interactions related to the customer are visible from within a single application.
- **CRM + 1-5 other customer databases**. We have a CRM system in place, but we have 1-5 other customer databases we must access separately to view all information pertaining to a customer.
- **CRM + >5 other customer databases**. We have a CRM system in place, but we have more than 5 other customer databases we must access separately to view all information pertaining to a customer.
- **No CRM.** We don't have a CRM system and must access multiple applications to view all information pertaining to a customer.

Figure 3: Member Adoption of 360° View



As seen in Figure 3, the largest percentage of respondents, 41%, have started the process of creating a single customer master, and have so far condensed down to five or less databases of customer information. 35% of community members have more progress to make, with more than five databases of customer information yet to integrate to the CRM 360° view. 18% claim victory, with a single CRM customer master in place.

Leveraging the 360° View: Contextual Interactions

Creating a 360° view does more than just consolidate data. By bringing every piece of information about a customer together in one location, CRM software enables improvements in multiple areas of serving customers, specifically increasing:

- **Productivity**. By having all details about a customer available in a single place, agents don't have to toggle between multiple desktop applications to find needed information, cutting call handling time.
- **Accuracy**. With all customer information at their fingertips, agents are able to make informed decisions about how to handle a customer problem based on customer history, technical environment, product versions, as well as any pending customer issues from across the enterprise.
- **Revenue**. As the 360° view grows, more highly personalized interactions can be achieved, with a major benefit being contextual upsell/cross-sell. Not only can sales and marketing better plan campaigns and offers for each customer, but service and support agents are able to extend appropriate offers automatically, with higher accept rates.

Data analytics play a major role in leveraging the 360° view, identifying trends and patterns amid the massive stores of customer data and enabling companies to anticipate customer requirements and create successful campaigns and customer-centric processes. In the following sections, more detail is provided about how the 360° view can improve productivity, accuracy and revenue.

Productivity

Financial services firms report that agents routinely access an average of 19 separate systems to find customer information, and obviously consolidating information into a single screen will boost agent productivity in a major way. Though technology companies typically have fewer customer databases, the results of the survey shown in Figure 3 demonstrate that many SSPA members require agents to toggle between five or more applications in order to help customers. When cutting even seconds off phone calls can make a significant impact to productivity and cost over a year, companies should look for ways to cut the number of desktop applications agents must access to service customers.

Luckily, new technology platforms are easing integration pains. Legacy CRM systems can only leverage customer information if it is stored in the CRM data model, meaning data from other applications must be de-normalized (duplicated), and keeping information current between the source and the CRM system is not trivial. Having accurate billing and shipping information, for example, means frequent batch processes are running, which eat up network bandwidth and can degrade system performance.

With web services integration, more CRM and analytics software is able to dynamically construct a 360° view of the customer using data wherever it is stored: information from external systems is retrieved as needed and displayed for the agent in a single screen. In this way, no data is de-normalized, and agents always see the most current, accurate information. When considering what data to consolidate for agents, with an eye toward productivity, prioritize the inclusion of:

- **Multi-channel interactions.** As new channels emerged, and new software vendors appeared with tools for individual channels, companies tended to add support for new channels one at a time. Today, many companies continue to use a CRM system for all phone interactions, but email, Web and chat interactions are stored in one or more eService systems. Unfortunately, integrating all of these interaction channels has been an uphill battle due to evolving technology and merging vendors. All agents, regardless of channel, should have a view of all cross-channel interactions.

  As today’s customers become more channel agnostic, it is common for a single customer to utilize every support channel offered, creating an incident via one channel and then asking for updates via an alternate channel. Don’t hamper an agent’s ability to serve the customer by not sharing the multi-channel 360° view with every agent.

- **Web self-service click streams.** Leading Web self-service software can capture all online activities of a customer (products viewed in an online catalog, knowledgebase search strings, solutions viewed) and include them in customer history, and ideally, imbed them in any subsequent support ticket opened by the customer. Armed with this information, an agent knows everything the customer has already attempted, eliminating diagnostic steps and avoiding wasting the customer's time by reattempting fixes they have already tried.

- **All sales and marketing communications.** CRM solves an age old complaint: sales or marketing announced a new product or a new promotion without telling support. Phone calls and emails start rolling in with no content authored to address the questions. It is imperative that every customer communication be included in the customer history, including direct mail and email product brochures and advertisements, as well as sales meetings.

  With marketing, sales and service often implementing siloed CRM systems, a major benefit of CRM is lost: cross enterprise customer awareness. Sales reps always complain when they make an account visit and are blindsided by a severe technical outage and irate customers. But the reverse is also true: sales needs to be sure support is aware of all sales events: negotiating for a new contract, quoting new or additional products, onsite visits, maintenance renewals, etc. Armed with this information, support agents can make sure service is exceptional whenever revenue hangs in the balance.

Accuracy

With adequate customer data, analytics can automate many customer touch points, making interactions shorter and much more accurate. In the same way Amazon.com is able to predict which book you want to buy, based on your profile and the books purchased by others with a similar profile, analytics can detect patterns in customer behavior and predict the root cause for some customer interactions. A simplistic example: if a large percentage of customers who buy a printer call the next day when they discover a cable was not included, any customer who has recently purchased a printer should be asked proactively if they need a cable when contacting support. Consider using analytics to mine the 360° view, identify patterns and suggest actions at these touch points:

- **Agent screen pop.** At the time of an agent screen pop, the customer has already been identified by the telephony and CRM systems. Instead of just popping customer contact information, consider also looking at products purchased, recent service history, and Web self-service click streams, and prompt the agent with a likely cause for the call if one can be identified.

- **Web self-service access.** Similarly, when a customer logs on to the Web self-service site, they should be proactively prompted with a personalized list of possible solutions to view based on their profile. This tailored FAQ list avoids the customer having to perform any searches and helps increase the odds of handling the issue without agent involvement.

- **Submit an email or chat request.** When an agent requests an assisted response, offering them a set of possible solutions to hopefully resolve the issue via self-service is a best practice. But most systems use a static FAQ list that is only marginally effective. By leveraging the customer history, analytics can compile a personalized FAQ list that is much more likely to deflect a live agent interaction.

Revenue

One of the key business reasons for implementing CRM software is to increase revenue. But this is typically the goal of the marketing and sales organization, not support. However, armed with a fully populated 360° view, analytics can take the guess work out of extending offers to customers as part of a service interaction.

As early adopters of upsell and cross-sell for inbound customer interactions in high volume consumer industries like communications and financial services found, offer extensions are much more effective if the offer is contextual to the interaction. For example, offering overdraft protection to a customer calling about a bounced check will find greater success than pitching retirement planning to a caller interested in a student loan. Only contextual offers are prompted to agents for extension, allowing a more natural transition to selling, as well as increasing the likelihood of offer acceptance.

The SSPA Recommends

Judging from survey results, most SSPA member companies have a CRM system in place. However, the work to create a single customer history is ongoing, and every new corporate merger or acquisition brings a new array of customer databases to include. If you are struggling to minimize the number of customer databases, consider these steps:

- **Inventory all customer information**. Just how many separate sources for customer data are there? What data do they contain, how often are they updated, and what review process does the data go through to verify accuracy?

- **Prioritize data sources for integration.** Not every piece of customer information is critical for maintaining relationships or solving support issues. Prioritize the various data sources based on applicability for support, and develop an integration plan for the most critical information.

- **Leverage Web services integration.** Not all data must be written into the CRM database. With real-time data retrieval available with Web services, some customer information can be pulled from an external system and displayed as needed, not duplicated into the CRM system. For example, having an optional window to display billing details makes the information easily available when needed, without having to open a separate desktop application.

About John Ragsdale……………………………………………………………

John Ragsdale is Vice President of Research for the SSPA. Ragsdale spent 10 years managing tech support operations before moving to Silicon Valley where he held product management and marketing positions at eService and CRM vendors. He spent 5 years at Forrester Research as VP and Research Director before joining the SSPA.

Comments? Suggestions? We would like to hear from you. Please email the editor at **sspanews@thesspa.com**.

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