Put the ‘R’ Back in CRM with a Customer Experience Platform

Introduction

In today’s highly competitive market, businesses need to have their customer support teams aware of any and all customer interactions to ensure the best customer experience. For this to happen, contact center and customer relationship management (CRM) systems need to expand beyond their traditional siloed operations. The key is looking to flexible, multichannel technologies that can unify all interactions (voice and digital) and map them to the overall customer journey. When you bring everything together into a coherent “system of engagement,” you unlock hidden value in your data, systems and people. Modernizing the contact center around this concept means thinking about how to be more responsive to customers. It is not as difficult to achieve as you may think.

The Problem with Current Structures

Midmarket-sized businesses struggle with some significant challenges when it comes to managing their customer relationships. Even when excellent service and top-notch experiences are the paramount goal, mid-sized businesses often find themselves squeezed into technologies that underserve their needs. Or, many overspend on big, unwieldy call center platforms that include dated ACD-based call routing technologies. In either case, these companies can find themselves unable to support the many varied contact channels today’s tech-savvy customers demand.

At the same time, the operational environment surrounding the customer experience is becoming more intricate. Businesses are challenged to understand customer behavior, all the while trying to anticipate what customers will contact them about, why, and when—and how can that behavior be influenced? It is harder and more important than ever to align specific channel options to context around customers’ needs and their expressed preferences. Businesses must spend a lot more time plotting out the customer’s journey through a complex array of touchpoints, often employed more now through mobile devices and the web, and then optimizing that pathway to be most productive for both the business and the customer. And it is not just contact centers involved in this—marketers have a key stake in this process as well.
All the while, investments in technology must be justified, requiring practitioners to learn how to measure the ROI on positive service experiences. Often if it can’t be quantified, it can’t be deployed.

Still, measures need to be taken to keep up with the rapidly shifting consumer and the new technologies that facilitate conversation. To modernize and stay competitive, mid-sized firms need to deploy more flexible solutions capable of supporting all the ways their customers want to communicate. This calls for a unified routing platform that functions as a “system of engagement”—the companion to the systems of record that businesses have long used to store and control their data, including information about customers.

Those two concepts—systems of record and systems of engagement are not new, but making the leap to technologies that can actually power them is still rare. Many businesses, especially those a notch smaller than large enterprises, default to a CRM system and hope for the best. But in this fast-moving new consumer-based world, that is no longer sufficient. If you want to fashion a truly positive customer experience, you need to think beyond CRM and consider how CRM, which serves more as a system of record, needs the addition of a flexible contact center communications platform to facilitate real customer engagement. Only when you can combine information resources with an engagement technology structure that integrates all channels and provides a scalable framework for action via routing, analysis, and interaction handling will you create a great customer experience.

Of course, it works in both directions. Information in the CRM powers businesses to engage, but a contact center also has to be able to feed data back into the enterprise for insight and analysis. Contact centers must be integrated into CRM and other back office systems so they can deliver a personalized customer experience throughout the sales and support process—even when the CRM system is in direct communication with the customer.

**Why CRM Is Necessary but Not Sufficient**

CRM is something of a misnomer—its strengths lie more in managing the *data about* customers than in the *relationship* with them. Despite its valuable role in storing the essential customer history information, many CRM deployments remain rooted outside the contact center, focused on serving the needs of salespeople, marketers and IT professionals.

This role is important, but it falls short of providing the entire structure needed to fully engage in meaningful conversation with customers. CRM can help inform an agent of the way interactions have unfolded with a customer in the past, but without an overlying analytics system or a way to connect multichannel interactions, it provides very little guidance into how to make future interactions more successful. In effect, CRM is an island or silo in the contact center. It can be made to interact with other systems, but it does not provide the mechanics for conducting or managing voice interactions.

To build a real relationship with customers requires the *engagement* piece to be aligned with the record-keeping component. And to accomplish that requires integrating the voice interaction platforms, as well as those for alternative communication channels, with the contact center data residing in CRM and analytics systems.
Successful relationship-building is hard; it requires attention to details about customer interactions that are more abstract than traditional measures of success, like average handle time or hold time. For example, it is important to be able to align the contact channels you have available to the preferences expressed by customers and the relevant context of what they want. Preferences and context, in turn, require you to understand what is motivating the customer’s behavior, both in the moment of the interaction and over longer terms. And not inconsequentially, there are two sides to the transaction—it has to be cost-justified and measured from the business’ end as well as the customer’s. Any customer experience program has to include metrics and KPIs that underline the ROI derived from investing in customer service and relationship-building.

These considerations are applied against the backdrop of a rapidly shifting customer revolution. Due to mobility and demographic changes, customers want more, make demands more quickly, and expect the terms they choose. That implies more channel options and greater costs, which in turn puts businesses in the position of needing more detailed information about how customers want to engage. Systems of record and systems of engagement naturally amplify each of the systems strengths.

To manage the increase in complexity, within the center and the customer base, many businesses are moving to more sophisticated interaction technologies, especially those that incorporate multichannel routing engines across all potential points of contact. Customers clearly want more transparency across channels and interaction types—they don’t want to repeat themselves or re-enter their information as they move from one contact mode to another. So businesses have to work hard to preserve the context of each interaction component, maintaining continuity that appears seamless to the customer. If they don’t take these steps, they risk the customer experiencing friction or a sense of disconnection as they interact with the business.

These complicated processes are beyond the scope of traditional CRM. In fact, they explain why modern ACDs have evolved beyond simple call handling to become more versatile platforms of engagement that orchestrate interactions occurring on all channels across the entire communications process. Putting the “R” back in CRM really means getting engagement and record-keeping systems working more powerfully together.
What Constitutes a System of Engagement?

A system of engagement is a set of technologies and processes that facilitate communications between parties. What distinguishes it from a system of record is its elasticity: a system of record like a CRM application is designed to establish and preserve “truths;” a system of engagement has the role of creating connections between people, or between machines and people. In that role, it is less concerned with codifying the outcomes as records in a database, and more concerned with allowing the people involved to collaborate and explore multiple possible options. The system of engagement is what you use to find your way to the “truth” (or the outcome), and the system of record is what you use to preserve it so it is available for the next engagement. In that role, systems of engagement focus more on user experiences than on data preservation.

The system of engagement contains all of the interactions mechanics that are familiar to contact centers: voice and digital channel routing, for example, including the tools that prioritize and process the customer’s journey. It has tools that are essential to a good interaction flow, like identity authentication.
Wherever you look in the interaction space, you will find some assistive technology that helps orchestrate the proper sequence of events—that is part of your system of engagement. Also part of it is the analytic infrastructure that helps the business understand what the customer might want to accomplish, as well as the operational tools for ensuring that agents are available, properly skilled and trained to produce quality interactions.

What businesses should aim for is a cooperative connection between their systems of record and systems of engagement. Successful engagement requires you to have access to agreed-upon customer truths—to know and make use of preferences and previous contact history for example. But systems of record don’t do much engagement on their own. They need to be leveraged and interpreted in the context of each separate touchpoint and each interaction.

So a successful system of engagement is needed to orchestrate the process that customers and agents all follow and to create opportunities for new contacts. It does so by tying together the connection modes (voice calls, digital channels, assisted and self-service) and providing mechanisms for adapting processes to new situations. In other words, a system of engagement contains the entire contact center operational stack, including the peripheral systems that supply agents with guidance, information, productivity status updates and all the other “records” that they then manipulate during a successful interaction with a customer. Figure 2 is a basic illustration of the many functions that can be incorporated into a productive system of engagement.
This distinction between the two types of technical systems may seem abstract, but there are real world reasons why decision-makers should keep these ideas in mind. First, when you manage customer conversations using this model (i.e., recordkeeping as separate but linked to engagement), you can more clearly see where there are gaps or silos in the technology that create friction or inefficiency in the experience. Instead of relying on a CRM system to provide the complete platform for interaction handling, you can better manage the feature sets of both CRM and the call handling platform to provide a seamless and integrated customer experience. Seeing the two as complementary domains helps managers see those silos and break them down.
What Success Looks Like

When you break down internal silos and other operational barriers, you put all the parts of the business in a more advantageous position to deliver real value to customers. The contact center benefits from having access to better situational data, which then leads to better decisions made in the moment. When your agents need to decide what kind of offer to make, or how to approach a wavering customer, it helps to have as much historical and contextual information as possible. From the point of view of marketers, the value lies in being able to take the data you already have about customer behavior and design programs which leverage the existing contact center communications structures. Both stakeholders win, but only if there is collaboration and a unified engagement and recordkeeping platform available.

When those systems are combined or working in close tandem, a contact center is capable of doing much more than simply handling calls. Today’s service delivery has to be adaptable enough to engage customers who have wide choices of interaction channels, who act impulsively and have broadcasting tools of their own (social media) to complain about or praise your service. Successfully engaging with customers means putting aside old notions of voice-centric only phone call interactions and embracing a much more sophisticated multithreaded interaction that combines mobile phones, agent-assisted and self-service, along with all the data necessary to track customer behavior and value.

Success looks something like this: a contact center that is aligned with the revenue and outcome goals of the rest of the organization. It collects better metrics that reflect the value of interactions (and customers), rather than just processing sheer numbers of them. A modern customer engagement platform encompasses more than “calls” to include subtler interactions that cross channels and don’t always end when the phone call ends. This added complexity cries out for an urgent integration between the data records and the engagement platform because having data is just a starting point. Only with an engagement platform plugged into the mix can you fully analyze and use what you know to craft optimal interactions and experiences, as well as drive better customer satisfaction and Net Promoter Scores (NPS®).

In effect, today’s engagement platforms encourage users to control the customer interaction environment, instead of passively describing it.

One example can be seen in the case of an international transportation services company. They needed to respond to customers coming to them via a wide spectrum of new channels, and wanted to improve service experiences. Their engagement and their recordkeeping needed to be brought up to a higher standard. By combining their Genesys Business Edition call center platform with Microsoft Lync and Siebel CRM systems, they fostered an environment where customers can now do things that weren’t possible before, like booking a maintenance appointment with a single call. And the company is better off because it can track customer contact data and avoid regulatory problems.

Success—especially for mid-sized companies—means being able to take the original value of the contact center, its magnificent efficiency at process, and turning it into effectiveness, a purposeful delivery of positive experiences that in turn result in revenue growth. The ingredients that go into accomplishing that task are access to customer data, efficient routing of interactions, and intelligent decision-making at each stage of the customer journey and more broadly, at each stage of the customer lifecycle.
That seems hard to achieve, but in today’s modern contact center it is within reach, provided you have the flexibility to be innovative and adaptive. Mid-market firms that fail to adapt, those that neglect their engagement platforms at the expense of CRM, will risk being overtaken by competitors. If you want to use service as a differentiator, you’ll want an informed service delivery structure that enables much more than quickly answered phone calls. Differentiation begins with anticipated needs, proactive solutions, optimized contacts and doing it all with an eye on the ROI.

An optimized system of engagement, driven by modern contact center solutions, is that competitive differentiator—it is the marriage of forward thinking strategy with next-generation technology, delivering what a modern customer wants in a way that also provides the accountability and performance that the business needs.

**Takeaways**

With this in mind, mid-sized businesses should consider this as they refashion their communications and CRM infrastructures:

- Agree on ideal customer interaction scenarios. The creation of lasting value does not happen in just one part of an organization. Firms have to be prepared to look at everything their organization does in order to become flexible enough to serve the modern customer. Marketing, sales, service and IT all have a stake in the outcome; their systems need to be linked and interdependent as well.

- Understand that systems of record and systems of engagement are complementary, and work best when used in concert. CRM alone is not sufficient as a tool for engaging with speedy, multichannel customers.

- Make plans to build out systems of record and engagement, including technologies that can work together to support your planned customer journeys. One of the major considerations you should plan for is how your business can integrate multichannel engagement with analytics tools to better facilitate complex conversations with customers to optimize interactions.

Only a fully integrated communications platform can provide the interaction-handling muscle to produce happy, engaged, long-lasting customers.
Appendix

Author
Keith Dawson, Principal Analyst, Customer Engagement
keith.dawson@ovum.com

About Genesys
Genesys is the market leader in omnichannel customer experience (CX) and contact center solutions in the cloud and on-premises. We help brands of all sizes make great CX great business. The Genesys Customer Experience Platform powers optimal customer journeys consistently across all touchpoints, channels and interactions to turn customers into brand advocates.

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