

E-Guide

# Top 5 CRM and CEM resources of 2013

*We've entered an era where glowing praise or scathing reviews can be instantly viewed by millions of consumers, and companies have taken note.*

*But how exactly are companies tackling this new challenge?*

*Inside, read core strategies and customer experience management best practices that businesses are currently applying to their CEM.*

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## **Salesforce vs. Siebel faceoff: Salesforce inventing CRM's future**

**By Denis Pombriant**

This is one side of a Salesforce vs. Siebel debate. The other side argues that Oracle Siebel is a more established, more versatile product.

Coke or Pepsi? Ford or Chevy? Betty or Veronica? Siebel or Salesforce? If only it was that easy.

Truth be told, I have done consulting work for each company in my career and have been impressed with the products, the people at both companies (they tend to migrate) and the seriousness that they apply to their missions as customer relationship management vendors.

Perhaps the best way to understand the comparison is not to start with functionality but with the markets each company serves. The markets look similar but are vastly different. Both companies court sales in small, medium and enterprise spaces. Because Siebel has been around longer, it became the early standard in the client-server era, and the company has worked for many years to upgrade from that platform to something more social and mobile.

On the other hand, Salesforce.com practically invented cloud computing -- it certainly marketed it into existence. So Salesforce has a more modern infrastructure, especially given the multi-tenant back end.

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These facts determine the kinds of customers each company attracts, and they drive long-term decisions about product evolution. Siebel (and I mean Oracle) has an older customer base and a more conservative one too. The Siebel customer is more likely to have started life in client-server and moved one upgrade at a time to a browser interface.

Today, each company has customers up and down the ladder, but Siebel is the one that tries to move customers into the future of computing, while Salesforce is the product already there and, to be fair, is inventing a lot of that future.

Siebel is the older solution, and its customers have dug in deeply, installing, tuning, using and maintaining their implementations in many cases for more than a decade. The talk at Siebel quickly gets into the bits and bytes of schema, performance tuning and other geeky topics. Customers are insulated from much of that in the Salesforce world and the perception is that Salesforce is easier to use.

Salesforce is the solution that companies access from the cloud, pay for by the drip and manage. Unless a Salesforce user is into the procedural logic of the applications (or is building one from scratch), he or she will encounter the front end of the Salesforce application and probably not much else.

Both companies offer social and mobile products that are quite good. But the impression I get is that Siebel is trying to apply social to its applications and business practices, while Salesforce has already embedded it. That is a big difference and it goes directly to the platform underpinnings. Siebel has the Oracle Fusion platform for development and, over time, the applications suite will be completely rewritten in Fusion. Kudos to Oracle for making Fusion an optional approach for now, which gives users plenty of time to equilibrate. However, there is also some concern over Fusion's fitness, but that will diminish with a few well-publicized successes.

Salesforce has, almost from the beginning, exposed its platform and API for customization and de novo development and, as a result, it has north of 1,700 partner applications sharing the same schema, tools, social infrastructure and login. So, to net out the situation, Siebel is built on the

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premise that the customer will have a significant IT staff to keep it running and to continue servicing the many customizations each user makes.

Salesforce is, at least in some ways, more standardized and that gives it a simpler operational profile. The company continues to gain share even in places where Oracle and other vendors are strong, especially in the enterprise. Some of Salesforce's marquee enterprise customers of late have many other products installed including Oracle, Siebel and SAP. But when decision-makers reach a point where they want to develop something such as Web applications in Heroku or social apps like the ones at GE, Coke and Toyota, Salesforce is making important inroads.

That reveals an important advantage for Salesforce. The company now has the capability to surround older systems with modern cloud, social, mobile and other technologies. As a result, Salesforce can continue to chip away at traditional deployments one application or department at a time. This is much the same strategy we see today in ERP where Microsoft, SAP and NetSuite are promoting two-tier ERP strategies that keep the old installed systems in place at headquarters but where all new development and deployment in the regions is done on modern cloud platforms.

Siebel is a product for more conservative organizations that are familiar with the IT paradigm of the late 20th century. They are at home with version releases, their applications and their business processes. On the other hand, Salesforce is the product of the clean slate. It is the product that you might throw away your conventional system for because it is such a departure from late 20th century standards; its adherents are more likely to be those who are comfortable with taking a judicious risk because with risk comes reward. Salesforce customers, more than any others, are inventing the future, inventing new business processes and often reinventing themselves.

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## Five customer experience management lessons learned from "Breaking Bad"

By Lena J. Weiner

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The plight of chemistry teacher turned drug kingpin Walter White on TV's *Breaking Bad* can help businesses learn a great deal about customer experience management, according to one software vendor.

The incredibly popular television show *Breaking Bad* ended its run this month and for anyone living under a rock during the past half-decade, the premise of the show is simple.

After a sudden diagnosis of terminal cancer, the underpaid and underinsured high school chemistry teacher, White, played by Bryan Cranston, chooses to make extra money by cooking and selling methamphetamine. With the help of a former student, Jesse Pinkman, White progresses from a simple, earnest man trying to take care of his family to a tough, hard-hearted Machiavellian drug kingpin.

There are many parallels between White's business and more mundane, above-board businesses, according to Kimberly Samuelson, director of enterprise content management (ECM) strategy at Laserfiche, a company that develops ECM and document management software.

"Walter White had founder syndrome," said Samuelson. "He was a genius and a bit of a narcissist. He was really good at cooking crystal meth and had a lot of ego and pride wrapped around it."

Organizations that are interested in doing customer experience management correctly have some things to learn from Mr. White -- and she's not talking about going back for a second dose of high school chemistry or drugging up your customers. Samuelson weighed in on five customer experience strategies that *Breaking Bad* got right.

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### 1. Have a great product

"Have a category killer," Samuelson said. "Walt's crystal blue meth was a very unique product no one other than Walt -- and later Jesse -- could build."

In the business world, a comparison would be to offer a product that no one is truly capable of imitating -- for example, the Starbucks Corp.'s Frappuccino. Many have attempted to copy it, but somehow they never quite capture the Starbucks experience.

### 2. Provide flexible customer service and have an agile product

Respond to the changing needs of your customers and the changing market conditions. Walter White's trademark blue meth came into existence when the protagonist was unable to procure a key ingredient in the manufacture of methamphetamine: pseudoephedrine. Instead, Walter and Jesse substituted methylamine, which contained a blue dye. While it slightly altered their product, it also meant that they were able to keep meeting their customers' needs, which kept the customers happy.

Respond to the emerging trends of your clients by, for example, staying in touch with them using multichannel customer service and social media marketing.

### 3. Be consistent

If a *Breaking Bad* meth head or drug dealer bought "Heisenberg's blue stuff," they knew they'd be getting a high-quality product each and every time, proving that consistency is of key importance. This is true in the legitimate business world as well. A consistent product appeals to most customers. When people go to McDonald's, they can be assured that the Big Mac they purchase and consume today is going to taste exactly the same as the Big Mac they bought yesterday -- or five years ago. McDonald's Corp. intentionally tries to keep its product consistent, because that's what their customers have come to expect.

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### 4. Be responsive and have a far-reaching distribution channel

Distribution was always difficult for Walter, as it is for most sellers of illegal products. This issue eventually led him to team up with Gus Fring, who used his chain of chicken restaurants to help distribute the meth.

Most legal business people don't have to worry about hiding behind a front company to distribute their product. But it's important to ensure that customers find ordering a product and contacting the organization easy. The usability of a website, ease of reaching a customer service representative and convenience are all factors that customers weigh when deciding which companies deserve their loyalty. If customers feel it's difficult to get in touch with a drug cartel, or a legitimate company, they will likely look for a more responsive and more professional organization.

### 5. Keep employees happy

"Walt, in his own sick way, always took care of Jesse," Samuelson said. Sure, Walt poisoned someone near and dear to Jesse and made it look like Gus did it. But he also protected Jesse from Mexican drug lords and saved Jesse from the horrors of addiction and the Aryan Brotherhood. Now there's a boss who goes the extra mile for employees.

Employee engagement has increasingly become an indicator of customer satisfaction. Customers can tell if employees aren't happy in their jobs, but they can also tell when they're enthusiastic and happy. Some companies, like Zappos, pride themselves on employee involvement and allowing the staff -- both customer-facing and otherwise -- to just be themselves and have fun at work. Additionally, providing training and a career path for motivated employees are great ways to ensure that employees feel like they belong.

*Breaking Bad* offered some great insight into the business world and lessons anyone in any industry can take advantage of. The most important lesson, though? Do what you're good at. "Cooking meth is a lot like cooking eggs," mused Samuelson. "There are a lot of ways to cook them, but it takes a



special chef to prepare them as a soufflé that will be awarded three Michelin stars. Walter White would be that chef."

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## **New contact center metrics recommended to fit new customer channels**

**By Aaron Lester**

In the world of contact centers, the telephone has always reigned supreme. No other channel has rivaled its efficiency and power.

But times are changing fast, and the metrics measuring agent and contact center performance must change with them if businesses are going to deliver the best possible customer experiences.

Within five years, the number of social media interactions at contact centers will be equal to the number of phone interactions, according to a new report released by DMG Consulting LLC in West Orange, N.J. Of those social interactions, 70% to 80% will be service-oriented and require attention, the report said.

"Contact centers are more than just about handling phone calls," said Donna Fluss, president of DMG. "But many are still struggling with how to handle all the new channels."

## **Breaking from the past**

Part of the struggle for contact centers is how best to use agent metrics to ensure efficiency, productivity and quality in contact centers as more and more customers use new channels to meet their customer service needs.

Not that long ago, a call center -- as it was known -- fielded only telephone calls from customers who had concerns about a product or service. With only one channel to measure, a call center agent's performance was measured by time per call, how many calls handled a day, a customer satisfaction score and other hard data.



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Now, as the name implies, a contact center uses many technologies to connect with customers. As a result, contact centers not only analyze phone interactions but also email, chat and social media exchanges on Twitter and Facebook to gauge an agent's performance.

But just like phone calls, Fluss said, these new customer interactions should be treated like formal channels with formal key performance indicators (KPIs) applied to agents who handle new customer channels. (KPIs evaluate factors that are crucial to the success of an organization, and these can differ per organization. In business, for instance, KPIs may be net revenue or a customer loyalty metric, while government might consider unemployment rates.)

"Some KPIs can be applied to multiple channels, and some are specific to social media," she said.

### New contact center metrics

The metrics that gauge social media and other new channel interactions, however, are fundamentally different from those used in traditional customer care, and each should be used accordingly, said Vit Horky, co-founder and managing director of Brand Embassy Ltd., a customer service consulting firm with offices in London, Prague and Berlin.

Contact centers should apply a set of KPIs for customer care that includes not only traditional customer service metrics, like first-response time, solution time and volume of conversations, but also social media-specific metrics, Horky said. Those include resolution ratio (the number of conversations solved in a public space versus those turned into private conversation) and sentiment analysis (the number of positive versus negative social comments).

But because many businesses haven't incorporated new channels under the contact center umbrella, these channels aren't measured with the same discipline as traditional phone interactions, and often without consistent KPIs and key metrics, said Kate Leggett, an analyst at Forrester Research Inc. in Cambridge, Mass.

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There is a lack of standardization across channels, Leggett said. "You want to measure all [channels] together. You want to understand the success of all interactions -- why one channel is working better for certain kinds of interactions, for example."

### It's not the channel; it's the resolution

While many experts agree that using new customer channels will only increase as mobile devices and social media become more commonplace in people's lives, others are not convinced adopting a new set of metrics is necessary or effective.

"I'm a skeptic of newer metrics," said Art Schoeller of Forrester. "We're used to [seeing contact center metrics] reports that are very black and white. But newer channels get into shades of gray."

As self-service becomes more popular, he said, only the toughest customer service interactions make it to an agent. As a result, "many contact centers are softening up on metrics like the speed of answering and other hard data. Instead, they are focusing on good, quality interactions and good empathy by the agent during complex interactions."

Besides, customers look for a lot of the same attributes in a customer service interaction regardless of the channel, Schoeller said. "To some extent," he said, "it's universal."

Mary Murcott, CEO of the Dallas-based Novo 1, agreed. "Actually, the metrics are the same," she said. "It's really about quality and effectiveness, or first contact resolution and productivity, no matter what channel."

It's the ability of the contact center representative to solve a problem on the first interaction that matters above all else, according to Murcott. To be sure, some measure of efficiency must be accounted for as well, she said. So KPIs such as contact handling time, time to answer and idle time play a role; it doesn't matter if the agent is responding to a chat, an email or a phone call.

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## Time will tell

Whether new channel-specific or one-metric-fits-all, relevant KPIs and best practices for social, chat, video and other new channel metrics are still emerging and evolving. Despite great pressure for customer service organizations to develop these new channels, enterprises are only just starting to adopt and deploy programs, according to a report produced by Telus International, a contact center outsourcer based in Vancouver, B.C.

Metrics should ensure that contact center agents are achieving their potential and that operations are efficient and productive across all channels.

As Leggett of Forrester said, "If you're a customer, you don't care about channel. You just want answers."

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## From Disney to dishwashers: Digital CRM to change customer experience

By Ashley Smith

Envision a Walt Disney World where no one has to wait in line. Ride times can be booked in advance on the Web or a smartphone app.

At this Disney World, parents wouldn't have to wander the park searching for their child's favorite character. They could book an appointment with Mickey Mouse or Cinderella and -- like magic -- the character would greet the child by name.

Turnstiles, paper tickets and cash would be things of the past. Visitors would use data-encoded rubber bracelets to enter the park and buy food and souvenirs. The bracelets would also serve as room keys and parking passes.

The concept may sound like it belongs in Tomorrowland, but Disney is rolling it out now. The bracelet is a prime example of what analysts call the next big wave of CRM: using digital technologies to enhance the customer experience.

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Companies in all sorts of industries are increasingly relying on computers and technology to make their customers happier, said Mitch Lieberman, a consultant who has made a career of helping companies use digital technologies to enhance customer experience.

Electric companies are rolling out smart meters that track customer usage by the minute, eliminating the need for meter readers. Customers ostensibly benefit because, eventually, the smart meters will notify them via text when a dryer is running during peak rate times or advise them to shut off a washing machine during peak usage.

Appliance companies are unveiling refrigerators that keep track of expiration dates and food supplies, and notify the owner when there's a repair issue -- often before the person detects it.

"You won't need to call the repairman -- the repairman will call you," said Lieberman, managing partner of DRI, a Portugal-based consulting firm with U.S. locations in Vermont and New York. "That's the next generation of CRM -- not social, but digital CRM."

### From digital CRM flows customer data

An Oracle survey released in February revealed that, on average, businesses estimate they'll spend 18% more in the next two years on technology designed to improve the customer experience. The survey, "Global Insights on Succeeding in the Customer Experience Era," collected responses from 1,342 senior executives in 18 countries.

These digital technologies are designed to keep customers happy and loyal, of course. Disney created the MyMagic+ bracelets to help make park visits more enjoyable by eliminating some of the hassles that arise while navigating a crowded tourist attraction. And Disney benefits because happy visitors tend to spend more and will return sooner.

But the technologies also help companies collect a ton of customer data that can be used to improve marketing. Suddenly, companies have a much clearer and broader picture of customer habits and preferences, knowing

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exactly what they're buying and when, or perhaps what they're doing at a given time.

Disney, for instance, will know which characters you interacted with and exactly how many hot dogs you ate -- information that can be used to lure you back. Disney declined to comment for this story.

A smart refrigerator by Samsung can tell you how to make the most of a hot dog meal. It offers recipe suggestions based on what's inside the fridge. The front of the appliance has a tablet with preloaded apps that track food and allow families to collaborate in the creation of grocery lists. If someone at home adds mustard to the list, another family member who is shopping can see the addition on a mobile device.

"Now I can use data and analytics to predict what you will like in the future," Lieberman said. "It's a value exchange. The customer experience is better and the company benefits."

Jim Dickie, managing partner of the Boulder, Colo.-based research firm CSO Insights, said the latest advancements in digital CRM also provide new sales opportunities. By contacting a customer when his or her refrigerator is broken, an appliance company has the opportunity to sell repair service or an extended warranty, he said.

"That's just another way of reaching the customer when they're likely to buy something," Dickie said.

## The customer perks of digital CRM

Giant companies like Disney and Samsung are not the only ones making use of digital CRM. Dickie points to Jawbone, a San Francisco company best known for its portable Jambox speakers and Bluetooth headsets.

Jawbone's newest product, the Up wristband, tracks all of a person's daily activity, including steps taken and calories burned, as well as sleep statistics such as total hours of sleep and the amount of time spent in certain sleep cycles.

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Customers who choose to share that data with Jawbone get the curiosity-quenching benefit of being able to compare their stats to those of their peers, while Jawbone gets valuable data it can sell to gyms, health food stores, sleep clinics -- you name it.

Then there's 23andMe, a Mountain View, Calif.-based company that does DNA analysis on saliva samples sent in by mail. The customer finds out if he or she has an increased risk of colon cancer or Alzheimer's, but 23andMe has the right to store that information in a database and sell it to marketers.

This type of personal data collection is controversial, but consumers who don't like it can choose to opt out. At Disney, use of MyMagic+ bracelets will be optional, at least in the beginning.

Experts do caution that there should be limits to digital CRM.

For smaller companies, Lieberman suggests automating inefficient things that take time away from customers, but not direct customer interactions. Automate functions such as sharing email or making people aware of customer satisfaction issues, but don't automate Tweets or Facebook posts. Also, never outsource customer communications, he said.

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## **Guide to customer experience management best practices, technologies**

By the SearchCRM.com Editorial Team

Customer experience management (CEM) is a growing part of customer relationship management, fueled by new technologies (e.g., tablets and smartphones) and the influx of social media, such as Twitter and Facebook. Glowing praise or scathing reviews are instantly viewed by millions of consumers, and companies have taken note.

This guide consists of articles that shed light on the new technologies shaping CEM today and offers advice on strategies and best practices

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organizations can use to optimize customer relations, increase profit and keep up with their consumers.

## TECHNOLOGIES

### 1. Social media and other technologies that are changing CEM

Social media tools such as Twitter and Facebook have influenced customer experience management in a big way, and companies are now investing in new technologies to keep pace and maintain good customer relations. These articles detail how organizations are incorporating social tools and customer experience management best practices into their operations.

- **Social media changing customer experience for the better**

Dennis Pombriant, CEO of Stoughton, Mass.-based Beagle Research Group, believes customer experience is having a renaissance due to the use of social media. He shares his opinion on which vendors are leading the charge with new CEM technologies.

#### OPINION

- **Experts say single view of customer makes communication more efficient**

With all the new technology out there, such as smartphones and tablets, companies are now communicating with customers through multiple channels. To do so more easily, they are using CEM technology to create a single view of the customer.

#### NEWS



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- **Cross-channel communication consistency is crucial for successful CEM**

Experts warn that companies need to have the technology to handle cross-channel communications without a drop in customer service quality or consistency. Multiple channels should be viewed as a single entity, not separate and unconnected.

NEWS

- **Tablets are important players in CEM**

The tablet trend is proving to be significant to customer experience management. Businesses and sales departments that use tablets have shown improved close rates and better customer relations, according to experts.

FEATURE

- **IBM purchases CEM analytics firm**

IBM enters customer experience management in a big way by acquiring Tealeaf Technology Inc., a customer experience analytics company based in San Francisco.

NEWS

## STRATEGIES

### 2. Making the most of technologies and employees

Technology is important, but it's not much use without strategies on how and when to use it while managing customer relationships. This section has articles that describe how businesses are serving their customers by investing in their employees.

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- **Coca-Cola, GE and Virgin Airlines strategize technology to connect to customers**

To retain and attract customers, businesses are employing new technologies such as touchscreens and Web analytics tools. But, according to experts, new technology means nothing without strategies in place.

FEATURE

- **Old-school contact center now studying CEM**

Contact centers have been generally viewed as a last stop for customers to air their grievances, but now organizations are seeing contact centers as another way to drive business, increase customer profitability and strengthen customer relationships.

FEATURE

- **Improve customer experience by focusing on employees**

Analysts warn that businesses are at risk if they do not capitalize on the link between satisfied employees and happy customers. But without executive support, the strategy will come to naught.

NEWS

- **Investment in employees yields better ROI**

It takes money to make money, as the old adage goes. A study shows that well-paid customer service employees are happier, resulting in better customer relationships, more sales and increased profits.

FEATURE

- **CEM requires more than just customer service**

Nowadays, customer service requires more than a pleasant personality and general computer knowledge. Businesses are now strategizing to strengthen customer experiences by teaching their employees collaborative, mobile, social media, problem-solving and organizational skills.

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### FEATURE

#### BEST PRACTICES

## 3. Best practices for customer experience management

This section includes best practices for organizations to follow when managing the customer experience. The articles include both success stories and stumbles of businesses that employ CEM.

- **How to plan for customer experience management**

Customer experience management is not just about managing customers; it's also about managing the processes. Experts weigh in with advice on what companies should do to improve customer service quality.

### NEWS

- **CEM a priority, not an afterthought**

Jeanne Bliss, co-founder and vice chair of Customer Bliss, a customer experience consultancy based in Los Angeles, shares her insights on why executives should regard CEM as the true work of their organizations.

### ANSWER

- **IT and contact center must join forces for great CEM**

For customer experience management to succeed, it is imperative that the contact center and IT department improve communication and work in tandem. Collaboration is key to preventing frustration and project delays.

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- **Content matters in customer experience management**

Delivering the right content the right way at the right time is essential for successful customer experience management. See what steps businesses are taking to communicate information to their customers.

**FEATURE**

- **Re-measure contact center metrics**

Evaluating employee performance is a catalyst for improving performance, but the metrics used to do so are sometimes outdated. Contact center metrics should be updated to relate more to customer experience management and business drives, not just tally call-handling goals.

**TIP**

## GLOSSARY

### 4. Terms related to CEM

This section contains common terms associated with customer experience management.

**CUSTOMER EXPERIENCE MANAGEMENT (CEM)**

**SOCIAL MEDIA**

**CUSTOMER LIFE CYCLE**

**SOCIAL MEDIA LISTENING**

**CRM (CUSTOMER RELATIONSHIP MANAGEMENT)**

**WEB SELF-SERVICE**

**SOCIAL CRM**

**CUSTOMER SERVICE AND SUPPORT (CSS)**

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## QUIZ

### 5. How much do you know about customer experience management best practices?

Take this short quiz to see how much you've learned about customer experience management.

## TEST YOUR KNOWLEDGE OF CUSTOMER EXPERIENCE MANAGEMENT BEST PRACTICES



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## Free resources for technology professionals

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