Why Omni-channel and CRM Must Be Symbiotic…
Agenda

Housekeeping

Introduction: PowerObjects & Customer Care

Why Omni-channel and CRM Must Be Symbiotic...

Keynote Speaker
  Speaker: Art Schoeller
  Forrester – VP, Principle Analyst

Keynote Speaker
  Speaker: Keith Brown
  Alliance Health – CIO

Q & A

Why Omni-channel and CRM Must Be Symbiotic...
Our Moderator

Jeff Wedren – PowerObjects
Director of Marketing, Leadership Team

Housekeeping Items:
- Recording today’s webinar
- Q&A at the end of the presentation

PowerObjects Website:
www.powerobjects.com

PowerObjects Blog:
www.powerobjects.com/blog/

PowerObjects Events:
www.powerobjects.com/dynamics-crm-events/

Customer Care Page
http://www.powerobjects.com/services/crm-solutions-for-customer-care/
We are a professional services firm 100% focused on Microsoft Dynamics CRM.
About PowerObjects

- Founded in 1993 – 300+ employees today
- Over 850 CRM customers worldwide
- 100% focused on CRM since 2008
- Largest Microsoft CRM practice & largest CRM support desk in the world
- We have one of the most widely visited Dynamics CRM websites in the world, including our blog and our free online Dynamics CRM guidebook: The CRM Book

Microsoft Awards & Recognition

- 2015 Cloud Customer Relationship Management Partner of the Year
- 2014 Microsoft Customer Relationship Management Award Finalist
- 2014 Customer Excellence Award for Cloud Transformation
- 2013 Microsoft Dynamics CRM Partner of the Year
- 2013/2011 Inner Circle for Microsoft Dynamics
- 2012 Microsoft Dynamics CRM Partner of the Year
- 2009/2010/2011 Presidents Club for Microsoft Dynamics
Our Keynote Speakers

Art Schoeller – Forrester
Vice President, Principal Analyst

As vice president and principal analyst at Forrester Research, Art Schoeller supports Application Development & Delivery (AD&D) Professionals who plan, build, and run unified communications and contact center workloads.

Keith Brown – Alliance Health
CIO

As CIO of Alliance Health, Keith leads the team responsible for all information technology and technical development services.
Why Omni-channel and CRM Must Be Symbiotic in Your Customer Care Center

Art Schoeller
Forrester
Vice President, Principle Analyst
Why Omni-channel and CRM Must Be Symbiotic in Your Customer Care Center

Sponsored by Power Objects

Art Schoeller
VP and Principal Analyst, Forrester Research
You run a contact center – is this your coffee mug?
The Age of The Customer shaped by social media

**Sources of dominance**

- **Age of manufacturing**
  - Mass manufacturing makes industrial powerhouses successful.
  - 1900-1960
  - Ford, RCA, GE, Boeing, P&G, Sony

- **Age of distribution**
  - Global connections and transportation systems make distribution key.
  - 1960-1990
  - Walmart, Toyota, UPS, CSX

- **Age of information**
  - Connected PCs and supply chains mean those who control information flow dominate.
  - 1990-2010
  - Amazon.com, Google, Intuit, MBNA

**Contenders**
- 2010-?
- Empowered buyers demand a new level of customer obsession.
- Contenders include Facebook, IBM, Best Buy, and Apple.

**Successful companies**
- 1900-1990
- 1990-2010
Few companies deliver an outstanding experience

Top Customer Service Trends For 2015

Trends 2015: The Future Of Customer Service

- **Pain-free**
  - Frictionless journeys
  - Mobile enabled

- **Proactive**
  - Proactive engagement
  - Preemptive service
  - Cognitive engagement

- **Personalized**
  - Decisioning
  - Journey analytics

- **Productive**
  - Improved agent experience
  - SaaS deployments
  - Technology consolidation

Source: Forrester Research, Inc. Unauthorized reproduction or distribution prohibited.
Customers expect effortless service

55% will abandon online purchases if they can’t find a quick answer

For 77%, valuing their time is the most important thing a company can do to provide good service

Source: January 2015, “Channel Management Core To Your Customer Service Strategy”
Consumer Adoption Of Communication Channels Has Noticeably Changed In Two Years
Channel Management: Core To Your Customer Service Strategy

Percentage of US online adults who have used the following customer service channels in the past 12 months

- Help or frequently asked questions (FAQs) on a company’s website: 76% (2014), 67% (2012)
- Conversation with a customer service representative or agent via telephone: 73% (2014), 73% (2012)
- The response to an email that I sent to customer service: 68% (2014), 58% (2012)
- Instant messaging/online chat with a live person: 58% (2014)
- Online forum or community with other customers: 50% (2014)
- Voice self-service*: 58% (2014)
- Screen sharing: 46% (2014)
- Using an online “virtual agent”: 43% (2014)
- Using a self-service mobile phone application*: 42% (2014)
- Sending a mobile/SMS message to the company: 38% (2014)
- Contacting a company using Twitter: 37% (2014)

Base: 4,509 to 7,411 US Online Adults (18+) who have used the specified customer service in the past 12 months (multiple responses accepted)

*Denotes categories where data is only available for 2014
FORRESTER RESEARCH | EBUSINESS & CHANNEL STRATEGY PROFESSIONALS

Satisfaction Is Still Highest For Traditional Channels, But Not By Much

Channel Management: Core To Your Customer Service Strategy

Percentage of US online adults who have adopted and reported satisfaction with the following customer service channels in the past 12 months
(4 or 5 on a scale of 1 [extremely dissatisfied] to 5 [extremely satisfied])

<table>
<thead>
<tr>
<th>Channel</th>
<th>2014</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with a customer service representative or agent via telephone</td>
<td>76%</td>
<td>69%</td>
</tr>
<tr>
<td>The response to an email that I sent to customer service</td>
<td>71%</td>
<td>60%</td>
</tr>
<tr>
<td>Help or frequently asked questions (FAQs) on a company’s website</td>
<td>70%</td>
<td>59%</td>
</tr>
<tr>
<td>Instant messaging/online chat with a live person</td>
<td>67%</td>
<td>63%</td>
</tr>
<tr>
<td>Using a self-service mobile phone application*</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>Screen sharing</td>
<td>63%</td>
<td>61%</td>
</tr>
<tr>
<td>Online forum or community with other customers</td>
<td>62%</td>
<td>59%</td>
</tr>
<tr>
<td>Using an online “virtual agent”*</td>
<td>55%</td>
<td>62%</td>
</tr>
<tr>
<td>Sending a mobile/SMS message to the company requesting assistance</td>
<td>59%</td>
<td>61%</td>
</tr>
<tr>
<td>Voice self-service*</td>
<td>56%</td>
<td>56%</td>
</tr>
<tr>
<td>Contacting a company using Twitter</td>
<td>55%</td>
<td>56%</td>
</tr>
</tbody>
</table>

Base: 1,620 to 5,374 US online adults (18+) who have used the specific customer service in the past 12 months

Source: Forrester’s North American Technographics® Customer Experience Online Survey, Q4 2012 (US);
*Denotes channel for which data is only available in 2014
How Schuh uses video chat

Schuh uses video to:
- Provide an extension of the retail experience on schuh.co.uk
- Offer video to visitors both proactively and reactively
- Guide visitors through the site with co-browsing

Contact center environment
- Approximately 80 agents; all of them multichannel, including video
- Located alongside a warehouse so agents can show merchandise
- Used initially for in-store experience; now training includes the same customer interaction courses in-store employees go through
- Grew from three video desks to 17 (using Vee24’s solution) within two years

Results
- 4x lift in conversion rates
- 10% increase in average order value
- 78% average NPS

Source: April 23, 2014, “See Me, Serve Me: Video Chat For Customer Service Starts To Take Hold” Forrester report
Staffing – do you hire multi-channel skilled agents?

In general, what is your contact center’s approach to having agents serve customers through multiple channels?

- All of our agents support multiple channels (e.g., voice, chat, email)
- Most of our agents support multiple channels, but some are specialists (e.g., social media)
- Most or all of our agents are specialists and support only a single channel

Base: 1022 contact center decision-makers with 20+ employees and 50+ seat contact center
Source: Forrsights Networks And Telecommunications Survey, Q1 2015
Many centers are planning for growth

How do you expect your firm’s overall number of contact center seats to change during the next 12 months?

- Increase more than 10%: 51%
- Increase 5% to 10%: 29%
- About the same: 13%
- Decrease 5% to 10%: 6%
- Decrease more than 10%: 1%
- Don't know: 0%

Base: 1022 contact center decision-makers with 20+ employees and 50+ seat contact center
Source: Forrsights Networks And Telecommunications Survey, Q1 2015
Taming the channel beast

Is it Omnichannel, multichannel, cross-channel, or the Discovery channel?
Do you support enjoyable customer journeys?
Organizations struggle with complex infrastructure and don’t know where to start
Key Attributes For A Cross-Channel Integration Architecture

Source: February 2014 “Connect The Dots Between Customer Self-Service And Contact Centers”
Cloud contact center interest is modest

Today, how does your firm primarily manage or deploy its contact center technology?
In the future, (your next provisioning cycle), how do you think your firm will prefer to manage or deploy its contact center technology?

Base: 776 contact center decision-makers with 20+ employees and 50+ seat contact center
Source: Forrsights Networks And Telecommunications Survey, Q1 2015
Money, money, money

How do I build a business case for this, and who pays for it?
Use Journey Maps To Match Touchpoints To Complete Experiences

This sample journey of a mortgage application flowing from the Web to the branch shows how journey maps can help identify appropriate touchpoints for a given experience and plot the end-to-end experience in order to manage potential touchpoint transitions.

Products must be findable via price comparison sites.

Develop web tools to help customers navigate their options.

Drive branch engagement with locator, appointment booker, etc.

Ensure all web-entered data can be accessed by branch associates.
# Metrics to measure success

<table>
<thead>
<tr>
<th>Metric</th>
<th>Optimization guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer response and acceptance rates across all outbound and inbound interactions across the CRM life cycle</td>
<td>Maximize</td>
</tr>
<tr>
<td>Incremental yield in sales, revenues, and profits per customer, channel, touchpoint, interaction, and agent</td>
<td>Maximize</td>
</tr>
<tr>
<td>Customer satisfaction, retention, upsell, cross-sell, and issue resolution</td>
<td>Maximize</td>
</tr>
<tr>
<td>Speed, productivity, and effectiveness of customer identification, qualification, acquisition, onboarding, targeting, issue detection, data gathering, problem resolution, and customer-soothing activities</td>
<td>Maximize</td>
</tr>
<tr>
<td>Opportunity costs associated with extending the wrong deal to less promising customers</td>
<td>Minimize</td>
</tr>
<tr>
<td>Customer irritation due to wrong, redundant, or repetitive/insensitive offers across channels or touchpoints</td>
<td>Minimize</td>
</tr>
<tr>
<td>Customer churn and defection</td>
<td>Minimize</td>
</tr>
<tr>
<td>Costs associated with manual issue resolution and conversation management across the CRM life cycle</td>
<td>Minimize</td>
</tr>
<tr>
<td>Staffing required to handle personnel-assisted interactions</td>
<td>Minimize</td>
</tr>
<tr>
<td>Staff turnover due to inadequate guidance on how to handle calls effectively</td>
<td>Minimize</td>
</tr>
<tr>
<td>Data center, hardware, and software costs associated with deploying and managing siloed channel-specific CRM infrastructure</td>
<td>Minimize</td>
</tr>
</tbody>
</table>
Caterpillar’s Champions Roles And Responsibilities

How Customer Experience Champions Transform Culture

Execution: customer experience deployment

- Monitoring and reporting the progress
- Interacting and influencing across functions and levels
- Planning local activities
- Transferring knowledge to customer-facing colleagues
- Identifying improvements and solving problems
- Coaching the local improvement process
- Facilitating sessions and the local improvement process
- Mapping and analyzing current situation

The champion’s role and responsibilities

- Champion in the DSDs, district offices, and dealers
- Champions inside the Caterpillar organization
- Customer experience detective — assessment and prioritization of operational projects
- Providing training and promoting CX
- Seeks solutions — drives implementation and sometimes drives projects

Source: Caterpillar

Source: Forrester Research, Inc. Unauthorized reproduction or distribution prohibited.
Opportunity is missed by most people because it is dressed in overalls and looks like work.

- Thomas Edison
Thank you

Art Schoeller
VP and Principal Analyst
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www.forrester.com
Why Omni-channel and CRM Must Be Symbiotic in Your Customer Care Center

Keith Brown
Alliance Health
CIO
Alliance Health Strategy Blueprint – consumer centric healthcare experience with integrated services and partners

Portfolio Offerings:
- Pharma Partners
- Biotech Partners
- Wearable Partners
- Device Partners
- Research Partners

Fulfillment Partners:
- Retail Pharmacy Chains
- Specialty Pharmacies
- Independent Retail Pharmacies

Consumers
- Chronic Conditions
- Multiple Therapies
- Seeking improved experience

Alliance Health
- Communities/Leads
- Multi-channel Engagement – web, voice, chat, email
- 360 Customer View
- Prescription Fulfillment
- Insurance and Doctor Setup
- Ongoing Customer Service

Custome
- Rapid Fulfillment
- Digital web engagement
- Customer Service
- High service phone engagement

Lead Generation & Activation

Partners
Ship Rx Product to Customer
29 condition-specific communities providing support to health care patients with chronic and complex conditions:

- ankylosing spondylitis
- anxiety
- arthritis
- asthma
- back pain
- bipolar disorder
- breast cancer
- chronic pain
- COPD
- crohn’s
- cystic fibrosis
- depression
- diabetic
- epilepsy
- fibromyalgia
- GERD
- heart
- hepatitis
- HIV
- hypothyroid
- lupus
- migraine
- multiple sclerosis
- obesity
- parkinson’s
- psoriasis
- rheumatoid
- severe allergy
- sleep
Step 1: Awareness

People seeking new therapies discover our awareness campaign and opt-in to request more information, agreeing to a phone consultation.
Step 2: Engagement

We contact the consumer by phone within 2 minutes after opt-in, educate them on their options, capture patient / provider details, investigate their benefits, create a patient file and deliver RX to ProCare for fulfillment.
Step 3: **Adherence**

**PROACTIVE OUTREACH**
- Text message and email reminders
- 24/7 access to online peer support
- Assess, encourage, strengthen therapy adherence

**ACTIVE RECOVERY**
- Contact patients who stop adhering and remove barriers
- Patients resume therapy
- Online community provides additional support for medication adherence
Step 4: Empower

We develop industry leading technology solutions and services to continually empower our customers and our team.
Alliance Health Integration Architecture

**Microsoft Azure** (alliancehealth.onmicrosoft.com)

- **Office365**
  - Skype for Business
  - Collaboration
  - Content Mgmt

- **Dynamics CRM Online**
  - Leads
  - Sales
  - Service

- **ADX Studio**
  - Partner Portal

**HIPAA Compliance**

- **Amazon Web Services**
  - Payment Service
  - PCI Compliance
  - Health Communities Connect Sites

- **Fulfillment & Distribution System**
  - Manual, FTP, or automated Order Flow
  - Ad-hoc Order Inquiry
  - Order Creation & Customer Service

- **PARTNER**
  - Authenticated Portal Access

- **PARTNER**
  - Authenticated User Access

- **Exact Target**
  - Email Marketing

**Alliance Health**
## Alliance Health Technology Architecture Principles and Benefits

<table>
<thead>
<tr>
<th>Principle</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Focused</td>
<td>Core Dynamics CRM platform focused on the customer</td>
</tr>
<tr>
<td>Flexible</td>
<td>Multiple business partner and product proposal CRM configurations</td>
</tr>
<tr>
<td>Cloud based</td>
<td>Cloud platforms ensure secure and scalable processes</td>
</tr>
<tr>
<td>Omni-channel</td>
<td>Multiple methods of customer engagement – web, voice, chat, email, video</td>
</tr>
<tr>
<td>Integrated</td>
<td>CRM is integrated with dialer, pharmacy, ERP and web platforms and services</td>
</tr>
<tr>
<td>Secure</td>
<td>HIPAA and PCI compliance built into both platform and custom components</td>
</tr>
</tbody>
</table>
Questions?

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