Good Morning VRM!
The CRM/VRM Connection

Prepared by Opus Research/Internet2Go
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Opus Research

- Founded in 1985 by Dan Miller
  - Launched the first advisory services on “new electronic media” in 1980
  - Focused on “intelligent network services,” IVR, e-publishing
  - Dealt with publishers, telcos, cable operators, game makers, studios

- There at the beginning
  - “Intelligent 800”, CallPromptr, EVS
  - CTI, IVR, Contact Centers...
  - IN, SS7, SIP, VoIP...

- Today’s Advisory Services:
  - Recombinant Communications (RC)
  - Internet2Go

- Conferences
  - Voice Biometrics Conference 2010 (www.voicebiocon.com)
  - Internet2Go
Recombinant Communications (RC)

Opportunities at the intersection of highly capable phones, Web Services, cloud computing and a range of “open source” software and well-defined APIs
Transformation to Collaboration

- Contact centers are less "formal" (brick and mortar)
  - Agents can be working at home
  - Help can be solicited from SME's (subject matter experts)
  - Adding the obvious "social" media
New Architecture
Channels are Changing

- Past was about “the phone”
- Evolved to include:
  - Email
  - Webchat
  - Alerts
  - Blogs
Workflows are changing

- “Sessions” are redefined
  - Was inbound call with routing keyed off DNIS (dialed number) and ANI (callerID)
  - Now spans time, space and media

- “Success” is redefined
  - Was answering before 3rd ring
  - Short hold times
  - Single-call resolution
  - “Capture rate"

- Outbound redux
  - Automated alerts
  - Unintended result of DNC (do not call list)
Engagement models are deepening

- New social graph
  - B2c is history
  - Replaced by:
    - E2E
    - &E2e
    - &e2e
    - &e2C
    - &c2c

Key:
"E"=Enterprise,
"e"=employee
"C"=Customer engaged by "E" and
"c"=customers in the wild
Back-end is getting more expansive

CRM → Transaction history → Payment status

Cell → Location → Destination

Call Records → Search History → Intent

Caller ID → Metadata → Identity → Entitlements

Who I am. Where I’m going. What I want to do. What I’m willing to share.
It’s getting w-a-a-y too complex

- Capturing much more metadata
  - From activity among each cell in the social graph
  - Monitoring real time to detect “#Fail”

- Applying more analytics - on archival stuff
  - To impute or predict intention
  - To become more prescriptive
  - To support other business objectives

- A “feel-good” tactic
  - Provides the feeling of better customer service
  - Rids the world of latencies
  - Creates more opportunities for serendipity
    more recommendations and exposure to people you "like"
It appeals as “social CRM”

- Provides the feeling of better customer service
  - Builds "loyalty"
  - Promotes positive image of brand
  - Requires less general advertising spending
  - Relies on “influencing the influencers”
  - Provides early detection of shortcomings
  - Promotes self-identified communities
  - Embraces new technologies
    - Location aware
    - Real time
    - Serendipitous
But it’s not VRM

- Still under control of The Big “E” (Enterprise)
  - Conversations
  - Data
  - Metadata

- Intent is the product of inference
  - Topology and workflows are both too complex
  - Little basis for trust
  - They think they “know” you
  - This will Fail
What’s missing?

- An agent or "facilitator" working on behalf of the customer/buyer
- Trusted storage of Profile info (name, payment preferences, vendor preferences, Loyalty programs)
- Ditto for instructions (stuff for sale, personal RFPs, standing orders, ...)
- Persistent but transparent monitoring/capture of dynamic info (location, intent, (sigh) checkins...)
- Simple ways to enter instructions (independent of specific vendors)
Ergo the “R Button”

- Graphic indicator of intent and engagement
  - Simple representation of complex roles
  - Changes appearance with change of state

- Embeds well into existing browsers
  - Signals willingness to engage
  - Recognizes the roles of third parties and facilitators
Time to put some meat on these bones

- Determine whether there is a “continuum” from CRM to VRM

- Define technical requirements

- Contrast requirements of vertical markets (E.g. healthcare, retail, financial, eGovernment)
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