



CONTINUOUS ENGAGEMENT MODEL™



entech

Continuous Engagement

Contents

- Document Overview 2
 - Acquire, Connect, Extend Framework 2
- Acquire 3
 - Omni-channel..... 3
 - “NOW” Customer Engagement..... 3
- Connect 8
 - Customer Experience is more than Marketing 8
 - Integration Is Key to Customer Service..... 8
- Extend 12
 - Infrastructure Enables Growth 12
 - Better Decisions Equal Better Results..... 12

Document Overview

This document contains the level 1 description of the Continuous Engagement Model (CEM): a holistic model for design and development of computing solutions that deliver customer centric capabilities for businesses.

In order to understand CEM it is first necessary to define customer centricity as related to IT solutions in today's business world.

The term customer centric has been defined as "creating a positive experience at the point of sale". This definition only focuses on the marketing and sales aspects of a company's relationships with its customers.

A better definition of customer centric is "Placing the customer at the center of a company's business." This definition encompasses the entire business/customer lifecycle. When looked at from this perspective, customer centricity is both Omni-channel (any channel, network or device) and multi-dimensional, encompassing marketing, sales, customer service, and back-office business analysis.

The CEM is a tool for building solutions that transform the way businesses acquire, connect and extend customer relationships.

Acquire, Connect, Extend Framework

The Acquire, Connect, and Extend framework of CEM is used to categorize the set of questions used to analyze customer requirements and define the technology capabilities required to deliver Continuous Engagement.

The following sections provide additional explanation about the Acquire, Connect, and Extend framework. Each section contains a table that defines the set of user facing customer questions and the set of enterprise IT software, services and operational capabilities an enterprise needs to have in place in order to achieve Continuous Engagement.

Acquire

Customer acquisition is the process of acquiring new sales prospects and/or converting existing sales prospects into new customers. The ability to acquire a customer depends on how effectively a business organization is able to use all of the tools at its disposal to build a relationship with that customer and get them over-the-line to make a purchase. In today's world, technology plays a part in every business relationship. So, building a relationship with a customer means using technology to market across all customer interaction points, being responsive to customer inquiries, and overcoming all purchase objections.

Continuous engagement from an "Acquire" perspective encompasses Omni-channel delivery and "NOW" based customer engagement.

Omni-channel

Omni-channel from a business technology perspective means the ability to deliver products, services, and support across and between all devices and communication channels. Omni-channel from a customer perspective means a seamless experience regardless of device, location, or channel. Customers want the same product selection, purchase and fulfillment options, and level of service regardless of how, where, when or why they interact.

In today's world, seamlessness is mandatory. To offer customers a truly seamless experience, the business itself must have a full view of each customer. Employees across an organization must have full visibility to customer information and the end to end supply chain. Omni-channel instrumentation must be in place that records and accounts for each and every customer interaction. This data is used to make customer communications continuous and conversational versus intermittent and transactional.

"NOW" Customer Engagement

"NOW" Customer Engagement is a measure of a business's customer responsiveness. A Harvard University study on responsiveness showed that sales reps who contacted leads within 1 hour were 7 times more likely to have a meaningful conversation with a decision maker. In another study that evaluated 1.25 million sales leads, it was found that companies that contacted people within an hour were sixty times more likely to qualify leads than companies that took 24 hours or more. Sixty times more likely! *Source: InsideSales.com*

Responsiveness doesn't just mean fast. Responsiveness is composed of two inseparable elements: speed and value. Of course speed is important, but if you're not fast with the content or information the customer needs, then you're not being responsive. If it takes a salesperson or a customer service rep three or four days to gather information to answer a question, *forget-about-it* because the sales prospect will have moved on, and the customer will likely not buy from your company again.

Customers want to deal with people who have the knowledge, experience and expertise to be helpful, useful, and interesting. It's not about personality; it's what you can do for them, that's what they buy. Make your company easy to do business with and deliver value at every interaction. Get continuously engaged.

Continuous Engagement Acquire Component Questions

Continuous Engagement “Acquire” questions	Continuous Engagement “Acquire” requirements
Customer Perspective	Enterprise Perspective
Are you providing Omni-channel product delivery and are all channels operational?	An extensible UI framework. Web, mobile and device application platform that supports Omni-channel delivery. Ability to tailor content delivery based on channel or device type.
Do all of your channels to market present a sales prospect with a consistent look and feel?	Product management system with content database and business logic to ensure consistent branding.
Can your sales prospect gets personalized products and services?	Back-office infrastructure in place to target prospects with personalized offers based on contextual profile gathered from within the company or from external sources. This requires a technological capability to collect information in real time, analyze it, and rapidly configure personalized offers for prospects. (Mass customization).
Do sales prospects have an easy to use self-service capability?	Current marketing channels offer self service capabilities for those prospects that do not require guidance. (i.e. self-service Web portal, information links, frequently asked questions document, knowledge database, etc...)
Can a sales prospect instantly chat with a sales representative and get a satisfactory response on the first contact?	On-line chat system in place. Chat representatives have scripts for common questions and sales scenarios.
Can you deliver relevant and timely product offers based on specified criteria (i.e. location, date, occasion, etc.)?	Ability to rapidly configure and do target marketing across channels based on specific criteria. For example, a high school graduations in Delaware take place on June 1st, whereas high school graduations in Philadelphia take place on June 26th. You Omni-channel product deployment systems can run loan promotion ads for college loans in Delaware last week of May, and in Philadelphia the week of 19th of June. A calendar of target markets can be scheduled.
Can a sales prospect interact with business over any channel (Web, mobile, text, chat, phone, wearables, sensors, kiosk, branch, 3rd party portal, related stores...), and have their information maintained if they cross channels (i.e. move from mobile device to Web page).	All communication channels are open for the prospect to get info or buy. Regardless of channel, the interaction with prospect is tagged with an ID and all information is recorded and maintained such that an alternate interface device can retrieve and display it.

Can you deliver personalized products and services based on contextual or customer profile information? Context can be prospects location, social profile, interactivity channel (i.e. web, mobile, kiosk), or combination of profile and contextual information.	Ability to collect contextual information and present offers.
Do you have a downloadable app available for download by prospective customers?	Mobile app available.
Can your sales prospect easily link to follow-on or additional services or applications offered by your company or a 3rd party.	Links to add on services or 3rd party services and APIs.
Can a prospect get varied new services, special deals, unique bundles through your company's Web portal or mobile app?	APIs platform that enables plugging-in of various products and services. i.e. 3 rd party provides can apply to deliver their products and services through your channels to market.
Can prospect gets offers through their place of employment?	Employers can sign up and use special offers to their employees as a recruitment benefit. Product management engine is available that can configure products and prices based on a prospect engaging through his/her place of employment.
Can the sales prospects get offers through eWOM (electronic word of mouth)? For example, Facebook, Twitter, etc...)	Software application for contextual processing. The software knows a prospect is a referral and configures the product offer appropriately. Further, the software can track a referral based customer conversion (i.e. prospect to customer) and maintains a database that holds business contract details. This data is used to ensure the third party who referred the new customer gets paid appropriately.
Can prospects access your products and services through other businesses?	APIs available to enable alternate sales channels.
Can a sales prospect send in a request for info via email, SMS, web form, phone call and receive a multi-channel response? For example prospect sends an SMS with a quest, they get an SMS response back, plus get an email that provides additional detail.	Linkages across all customer communication channels. Single click multi-media responses.
Can prospect instantly gets a confirmation response to a request for information? - All channels.	Automated response mechanisms for confirmation of request across all channels. For example, if prospect clicks on a web site to request info, they have a field to enter their phone number and either get a call or get sent a text confirming the request. Internal business capability to store the interaction, identify it, and begin a profile of the prospect.

Can a prospect making a detailed information request via phone, email or SMS get routed to the right person that can provide the requested information immediately?	Ability to route the question, regardless of channel, to appropriate internal resource that can respond to the immediately.
Are sales prospects guided through to a purchase?	System can track live interactions so prospects can be guided through all transactions.
Can sales prospects get immediate responses to questions? (Instant message, chat, phone, text, email)	Service reps are trained. Chat system is available. SMS service available. Email system is available. Business processes with response SLAs in place. A sales system that has easily accessible scripts for reps to use to guide a prospect to a sale.
For phone call requests - IVR system retains prospect information and passes information if transition is required to live representative.	CTI integration where state is maintained so prospect can transition to reps. Phone to computer data source connectors.
Can a prospect schedule follow-up communication over a selected channel (i.e. phone, chat, video conference...)	Scheduling tool linked to customer ID and profile.
Can a sales prospect be offered product recommendations or promotions based on location or some other variable?	Application in back office that allows both the system and/or a sales rep to instantly enact a promotion or pricing change and based on some criteria and publish it to multiple channels.
Can a prospect see or learn through a sales person if any of their social network contacts is already a customer? (people buy what their friends buy)	Social media APIs are in place to gather info on a prospects so that personalized products and services can be offered. Also, capability to do queries related to contacts which can be used to assist in converting a prospect to a sale.
Are systems in place to monitor prospect behaviors? For example, is the web site monitored for drop-offs? Are reports produced to analyze why prospects don't convert?	Logging, data collection and analytics capability. Big data analysis system if scale is required.
Can information about sales prospects be gathered behind the scenes from other sources in order to eliminating data entry requirements? For example, a bank web site may want to eliminate data entry for customers that are applying for a loan. A system can be in place (with user authorization) that gathers information from FB profile, Linked-in, government agency, credit bureau, employer payroll processor, etc., and automatically fills in loan application forms.	Authorization interface with connectors and APIs to get data from other sources. For example, FB API integration to obtain profile info, Linked-in API integration for prospect/customer profile, employer payroll processor integration to validate income, etc...)
Can a prospect electronically submit forms or applications from web, email, fax, and phone?	Document upload and management system. Tracking system to ensure all documents are collected and status of overall document collection requirements.
Can prospects get prompted for completion or	System to automatically send alerts and prompts

<p>submittal of documents for deployments where this is required? For example, Bank loans, medical forms, insurance reimbursements, product support transactions, and others.</p>	<p>or offers to prospect via text, email, mail, phone or other message medium based on scheduling or event based requirements.</p>
<p>Can prospects sign forms electronically?</p>	<p>Authorization and signature verification system.</p>
<p>Are convenience features available for prospects to request information or purchase from associated companies directly from you're company's web site?</p>	<p>A third party portal or set of API's that enables companies to join your business ecosystem and sell their products through to your customers.</p> <p>A revenue management system that tracks and provides settlement across a third party ecosystem.</p>
<p>Can prospects that want to do it themselves easily find information and gather data?</p>	<p>Self-service portal that is accessible from all channels.</p>
<p>Can prospects or customers personalize their products and services?</p>	<p>Product configuration tool is available for customers to design product based on their specifications.</p>

Connect

The Connect module of CEM is about extending the concept of customer centricity past the marketing and sales to include seamless information sharing across the entire enterprise and predictive business intelligence. A business can't just be customer centric up until the point of sale. It needs to follow through and ensure that every customer interaction is treated as a sales opportunity. The model needs to move from transactional to conversational. One where the business/customer relationship continually grows.

Customer Experience is more than Marketing

Many stats from reputable sources clearly show that positive customer experiences drive revenue and lower costs. For example, Marketing Metrics - The Definitive Guide to Measuring Marketing Performance states "The probability of selling to an existing customer is 60 – 70%. The probability of selling to a new prospect is 5-20%".

Yet many companies ignore the statistics and ignore customer service as a primary vehicle for business growth. Worse than missing growth opportunities, companies are losing customers due to poor customer service. "89% of consumers began doing business with a competitor following a poor customer experience." *Source: RightNow Customer Experience Impact Report*

The customer service challenge has become worse as mobile technology has become the intermediary in the business/customer value chain. "84% of US adults who have conducted an online transaction through a mobile device in the last year report experiencing a problem, and 63% percent of adults are less likely to buy from the same company via other purchase channels if they experienced a problem with a transaction on their mobile phones." *Source: Tealeaf Mobile Transaction Research Report*

Integration Is Key to Customer Service

It's not just mobile technology that creates customer service issues. The entire technology chain needs to be tuned to be customer centric.

Many times businesses realize they need to be continuously engaged with customers, but their lack of application integration across the enterprise prevent them from getting there. Customer service reps can't access customer data. This slows up response times. Slow responses mean lost business. Another enterprise challenge are legacy applications that are indispensable, but hard to access.

To build a truly customer-centric organization, back-office systems like CRM, Inventory Control, Manufacturing, Finance and Operations must be connected so customer service reps can retrieve information and respond instantly to customer requests. A recent McKinsey report shows that connected technologies stand to unlock from \$900 billion to \$1.3 trillion in business value. According to the report, all that upside comes from "improved communications and collaboration within and across enterprises." To capture this potential value, organizations need to redefine customer experience in terms of continuous engagement at every touch point, from support, marketing, and sales, to inventory, billing and collections.

Continuous Engagement Connect Component Questions

Continuous Engagement “Connect” questions	Continuous Engagement “Connect” requirements
Customer Perspective	Enterprise Perspective
<p>Can customers get fast responses to queries?</p>	<p>Speed takes two forms:</p> <ol style="list-style-type: none"> 1) Performance - Web sites and other electronic channels are monitored for availability and performance. 2) Responsiveness - Customer service representatives have real-time access to customer profile data, purchase history, service requests, etc... They have the information they need at their fingertips in order to respond appropriately to customer queries on the first request. <p>Ensuring reps have access to information requires connectors across sales, CRM, billing, inventory control, provisioning and other systems so information is easily accessible.</p> <p>This may also entail standardization of data formatting. Many times application functionality requires data be in a specific format and different systems have different data formatting requirements.</p> <p>For scalability and flexibility, the entire framework for data sharing and application functionality should be based on loosely coupled Service Oriented Architecture (SOA).</p>
<p>In order to be responsive does the company have enough knowledgeable people available for service and support?</p>	<p>Sales and service scripts are available to representatives.</p> <p>Workforce management and issue tracking tools are in place to ensure staffing and support requirements are met. This requires monitoring and management of requests.</p>

	<p>Systems are in place to collect and analyze customer data.</p> <p>Real time access to customer information is available to all departments, and processes are in place to ensure that customer facing activities are prioritized.</p> <p>Skills Based Routing (SBR) system or triage based systems that enable skills matching and customer routing to appropriate person that can resolve issues or questions.</p>
<p>Can the customer access the information they need and complete all transactions themselves if they want to?</p>	<p>Self-Service portal is in place. Customers can access all product information, purchase products, and easily find detailed information or training if required.</p> <p>Content management system in place for multimedia content access, storage and management.</p> <p>Service interfaces are available so customer can access profile, history, billing, inventory, etc.</p> <p>Customers can access product development and delivery status.</p> <p>A workflow system is in place to track customer purchase through delivery.</p> <p>A structured knowledge base is in place with search capability. Customers can contribute to knowledgebase.</p> <p>Customers using self service capabilities can transfer seamlessly to support reps. If the customer has entered information it is maintained during transition.</p>
<p>Can customer access and purchase products over all channels?</p>	<p>Network services are in place providing Omni-channel access.</p> <p>Content management server is in place that manages product marketing and sales content.</p> <p>On-line shopping cart and payment services are available.</p>

	All channels are monitored for performance and operational availability.
Does the Web site and or mobile application proactively anticipate data requirements and automatically gather and assist with providing them? For example, does the web site automatically fill in shipping address based on a previous transaction?	Connectivity between front end user facing applications and web sites and back-office databases. Business logic in place to support seamless purchasing or a prospective customer's information collection process.
Does the business make delivery convenient?	Provisioning system is configurable. Employees and customers themselves can access provisioning and scheduling data.
Can customers access knowledgeable person on first contact even if they are transferred to another person?	System in place to ensure customers are routed to appropriate person to answer their request. If customer has to be routed to second person, information collected by the first person is maintained and passed on to the second person.
Can customers can start a transaction on one channel and complete it on another?	Session management capability that maintains data across devices and networks.
Do customers and support personnel have access to complete customer history?	Integration to CRM, case management, or other systems in the enterprise that contains customer information.
In situations requiring multiple parties to be part of a sales transaction, are status alerts, scheduling of events, and sign-offs handled automatically?	Work flow system is in place that guides, tracks and reports status of customer interactions. The system should have notification services that prompt users to complete their portion of the work flow and alerts them when there are errors or when responses are taking too long.
Are customers notified of new products and services?	Content management or product management system is integrated with the sales and CRM system. New product release events are automatically pushed across channels and can kick off notification campaigns (email, tweets, etc...) both internally (for employees) and externally (customer marketing).
Can customer and support personnel collaborate electronically in real time to resolve issues?	Collaborative IT software that enables a support reps to easily communicate with each other and also see what a customer is doing.

Extend

The Extend module of CEM helps organizations establish scalable, flexible, secure infrastructures and predictive business intelligence capabilities that foster business growth.

Infrastructure Enables Growth

Most enterprises today have mixed platforms and various software architectures. This presents many challenges to IT organizations, including:

- Legacy platforms that continue to provide value, but draw resources, thus constraining an IT organizations ability to meet new customer demands.
- Stovepipe software architectures designed for a division level needs, that won't scale to meet enterprise level demands.
- Multiple applications scattered across different platforms with redundant data in different formats.
- Platforms and software architectures designed for 1000s of users that now need to scale to millions.

Successful IT platforms and architectures require careful strategic design of every layer. The hardware, network, operating system, architecture, data layer, middleware, and presentation framework need thoroughly analyzed and tested. Computing infrastructure (on-site, hosted, cloud, hybrid) needs to be designed based on today's and tomorrow's needs. Interface options, performance requirements, and security needs must be completely understood.

Better Decisions Equal Better Results

Incremental improvements in business intelligence leads to better decisions at all levels of an organization. Better decisions result in improved sales, better customer service, and higher quality products.

Predictive Business Intelligence used to be the domain of ivory tower statisticians, far removed from the everyday life of business decision makers. Not anymore. As more and more data comes on-line and is integrated with sales, CRM, ERP, provisioning, billing and other mission critical systems, the "single view of the customer" needs to be a core business focus.

The Extend module of CEM is about putting in place the technologies for gathering, analyzing, and converting customer profile, purchase history, market info, social media data, and more into real time decision making information. It pushes the limits of traditional business intelligence using Big Data and contextual analysis to resolve issues, personalize products and services, and provide innovative cross selling opportunities.

Continuous Engagement Extend Component Questions

Continuous Engagement “Extend” questions	Continuous Engagement “Extend” requirements
Customer Perspective	Enterprise Perspective
Are computing infrastructures reliable, scalable, and secure?	<p>IT infrastructure is built to withstand outages.</p> <p>Optimized on-site, cloud, or hybrid virtualized deployment of computing capabilities based on scalability, performance and security requirements.</p> <p>System back-up and failover redundancy is in place.</p> <p>Load balancing for peak usage periods.</p> <p>Operational performance and security monitoring.</p>
Is transactional performance great? (i.e. mobile and web systems are responsive)	IT infrastructure is built on high performance architecture. Continuous system monitoring is in place and support team reacts effectively.
Is system security great?	<p>IT infrastructure is built on secure architecture.</p> <p>Policies in place for sensitive data.</p> <p>Network and systems segmented in a way that provides the highest possible level of security.</p> <p>Vulnerability testing completed regularly.</p> <p>Rigid adherence to security policies and system updates.</p>
<p>Are customer services rapidly modified or enabled?</p> <p>Is there a constant stream of updated and new technology capabilities?</p>	<p>Service Oriented Architecture</p> <p>Middleware connecting enterprise systems.</p> <p>APIs for reusable modules of functionality and connectivity.</p>

	Service enablers for data exchange across systems and databases.
Are Omni-channel technologies available for customer to interact with the business?	Extensible system that can deliver products and services across different networks and devices and accommodates new communication technologies and devices as they become relevant (i.e. IoT technologies like RFID, NFC, ZigBee, etc.)
Are associated products and services easily accessed?	<p>API's are available to grow integrated ecosystem of related providers of products and services that can enhance customer's experience.</p> <p>Predictive business logic that collects data from various internal systems and social media to determine likely products or services a customer may need, and suggests or recommends them.</p> <p>Context interpretation software that can determine relevant profile data based on the customers current situation (i.e. location, status, related purchases, income, social media messaging, etc...)</p>
Are relevant product and service offers shown to customer?	<p>Internal systems maintain customer history.</p> <p>Social media collection services build out customer profile.</p> <p>Links are in place to product management system to create customized offers for follow-up sales to customers.</p> <p>Related products are recommended to the customer.</p> <p>A system that can deliver offers based on point in time, geo-location, or other contextual information. (i.e. A customer is at an auto dealership, so send them an advertisement for a percentage discount on a car loan)</p>
Are social networking services provided to the customer?	Based on businesses profile of the customer, a system is available to enable the customer to reach out and link to other customers with similar interests. (For example, Joe purchased fishing rods so is likely a fisherman. Joe has access to contact other fisherman customers of the company.)
Can the customer request be personalized without having to enter a lot of profile information?	Data collection and analysis systems in place to continually access and analyze customer data

	and determine products personalized to customer needs. Collected data is automatically used to fill in forms and make it easier for the customer.
Can a business owner rapidly analyze sales data and investigate root causes?	<p>Management dashboard for collection and display of relevant data points about sales. Product quality information is available.</p> <p>Social media is monitored for product reviews and the information is analyzed to enhance products.</p> <p>Customer service data is collected and monitored and used to prioritize new product development features.</p>
Are social media reviews monitored and responded to?	Automated systems to monitor social media and advice services and deliver alerts that enable the enterprise to respond rapidly.
Does the company provide personalized extras, like special discounts based on a birthday or anniversary?	Extensible CRM system.

Note:

The Continuous Engagement Model is dynamic. It will grow and change as individuals contribute and new ideas, services, and technologies become available.