

# 2016 MEGA TRENDS

It's always fun to read predictions from experts as they look into the future and forecast what trends will come to the forefront in the next 12 months. Of course, the experts have a more-than-uncanny gift for foresight—they are the ones actually driving change, and for them, 12 months is the foreseeable future.

In the following pages, you will get a very educated glimpse into what 2016 trends and priorities will take shape in the world of customer relationship management. Aptean's and Microsoft's themes are very much aligned with their predictions of technology solutions gaining better adoption rates as an emphasis on employee empowerment comes to the fore. Providing employees with access to easily usable technology is critical to providing great customer experiences. Infor CRM predicts a change in corporate perspective to better retain customers. inContact predicts the rise of Voice as a Service, Omni-Channel, and Workforce Optimization in the SMB market. Verint leans out a bit further into the future with their predictions and introduces two concepts I've not seen expressed quite so succinctly: customer engagement optimization and predictive engagement. And the steady advance of the Internet of Things is poised to completely change the concept of CRM.

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## Aptean

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PERSONAL VALUE  
WILL MEASURE CRM SUCCESS  
IN 2016

## Parature, from Microsoft

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EMPLOYEE EMPOWERMENT  
WILL SEPARATE CUSTOMER  
EXPERIENCE LEADERS AND  
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TRENDS & PREDICTIONS  
FOR 2016

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# Personal Value Will Measure CRM Success in 2016

By Matt Keenan

Customer Relationship Management (CRM) solutions are entrenched standards in today's modern, enterprise ecosystem. Organizations and users have come to expect that their CRM system is a core part of day to day responsibilities and in many cases serve as a key system of truth regarding a wide variety of business metrics. Unfortunately, the value, impact, and accuracy of the CRM system comes into question as employees compare their experience with their CRM system with technologies that they use on a daily basis in their personal lives.

With that challenge as the backdrop, we look to the top trends emerging in 2016 to answer the challenge. Trend predictions are useful to investigate as you look ahead to how your organization should operate in the upcoming years. What to do with these predictions in 2016 will be the key to your organization's success this year and every year in the foreseeable future.

## USER EMPOWERMENT

CRM solutions will be forced to become more intuitive as users demand an interface that includes best-practice usability from the current market leading consumer websites, thus eliminating the need for lengthy training to learn how to use the system. Users no longer need a training course or extensive manual to complete an online purchase, book a flight, etc. Instead, the user will be able to perform these simple tasks easily within their system. Designing CRM solutions with an experience that empowers the user is an important shift toward the increased adoptability of CRM solutions.

## MEASURES OF PERSONAL VALUE

Simply collecting a vast array of numerical data from a CRM solution won't make businesses smarter or salespeople more productive. CRM ROI will no longer be viewed primarily on the organizational level



as the "Age of the User" is now in full effect. The user will determine the true value of the CRM solution based on their individual productivity gains and insight it brings to their job each day. Successful CRM solutions will be measured by the personal value they bring to the user first and the value they bring to the organization second.

## MICRO-MOMENTS OF PRODUCTIVITY

In the digital age of things, relationships between machines and people are becoming increasingly competitive. Smart machines (i.e. smartphones, tablets, etc.) are acquiring the capabilities to perform more and more daily activities at a fast pace. The best CRM solutions will become integrated into the daily work life of a user, almost taking on more of a co-worker role rather than just added technology, allowing the user to access and input information whenever and wherever. In this mobile and hyper connected world, the user expects to have quick and seamless access to CRM data and analytics whether from their smartphone, tablet or desktop. The top CRM systems will deliver micro-moments of productivity and insight at the user's point of access, enabling them to move at an extraordinary velocity. Adapting to the fast-paced user environment is critical to being proactive and making impactful business decisions.

## CONCLUSION

With significant changes in the user's personal adaptation of their CRM solution, there won't be much rest in the year ahead for CRM professionals. Instead rather, there will be a fresh crop of new opportunities to consider. Keeping user experience, personal value of the solution, and the pace in which the digital age contributes to in mind will keep CRM professionals at the forefront in 2016. ■



**Matt Keenan** is group vice president of CRM products at Aptean, looking at a set of strategies for building life-long relationships with customers. Keenan is a 20+ year veteran with deep experience in all facets of CRM including sales, service, marketing and social CRM. He has worked with companies of all sizes across a wide range of industries to evaluate, develop and implement customer-centric initiatives, including sales, channel, and customer service process design as well as technology platform evaluation and implementation.

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# Employee Empowerment Will Separate Customer Experience Leaders and Laggards

By Bill Patterson

With customer service and customer experience beginning to overtake price and product as brand differentiators, big investments have been made over the past few years in empowering customers with more ways to engage, provide feedback and share their experiences. Marketing has also been given a bigger piece of the pecuniary pie to tout customer obsession and customer experience excellence.

Yet most employees are trying to walk marketing's meritorious talk with the same siloed technologies and stagnant knowledge repositories they've used (or not used) for years. This is creating a customer service and customer experience divide that will further separate leaders from laggards in 2016.

Consider these statistics: 90% of consumers say they expect consistency and continuity from a brand across channels. Yet, according to Forrester Research, only 36% of contact centers have implemented multichannel integration to provide consistent experiences; 70% do not train agents to support multiple channels, and 56% do not offer an agent-facing knowledge management solution. In addition, a third of Gen Y workers say their at home technology is better than what they have at work.

Most customers now update their personal technology every one to two years. Isn't it time we engage the empowered customer with equally empowered employees?

## CUSTOMER SERVICE: COST OR VALUE CENTER?

Organizations that will continue to struggle in customer service and customer experience cling to the perception of customer service as a single department and a cost center when nothing could be further

from today's truth. Customer service should be made the responsibility of every employee, positioned as a value center, and invested in as such by brands that not only wish to survive, but to lead in profits and perception. According to Microsoft's Global State of Multichannel Customer Service Report, 97% of consumers say customer service is important in their choice of and loyalty to a brand, and 60% have higher customer service expectations than just one year ago.

## EMPLOYEE EMPOWERMENT: WHERE TO START

To improve employee empowerment for customer service and engagement moving forward, knowledge must become a foundational investment. The benefits of all employees being empowered with knowledge are many but include increased first contact resolution, increased customer satisfaction and consistent responses across departments and channels.

Currently, according to IDC, 44% of the time employees can't find the answer or information they're looking for, and 61% currently have to access four or more systems when looking, resulting in frustration and dissatisfaction all around.

## BEYOND KNOWLEDGE: INSIGHTS

Beyond the basic knowledge to serve, customer-facing employees must also be empowered with customer and performance insights. Leaders in 2016 will give customer-facing employees access to key customer insights to drive more personalized, proactive and predictive engagement.

This will include not only a detailed profile of the customer and the products and services they use, but tools such as sentiment analysis, real-time feedback and above-the-queue insights showing what the customer has done to date in seeking

resolution so that the customer never has to repeat himself.

Going a step further, customer service agents will be empowered with a real-time view of their workload, service desk activity, their performance and will be able to leverage peer-to-peer collaboration technology to give and get help. Machine learning will add speed and intelligence to detect both patterns and trends, improving productivity, response times and next best actions.

## BEYOND INSIGHTS: MOBILITY

Leaders will empower employees with the same mobility and real-time engagement capabilities that customers use to connect. From service desk operation on a tablet, to field service updates on a wearable device, to searching, finding and sharing knowledge via their smartphone, mobility will transform the siloed contact center of the past into the organizational-wide customer engagement center of the future.

Gartner Research notes that in 2016, 89% of companies will compete mostly on the basis of customer experience. Many brands and organizations will talk the talk, but those that empower employees, and invest in customer service, will be able to walk the walk. ■



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# CRM Trends to Watch

## Four Trends You Can't Afford to Ignore

By Ryan Hollenbeck, Senior Vice President, Global Marketing, Verint® Systems Inc.

With the beginning of a new year, your organization may be assessing its strategy for emerging industry trends. What can you expect in 2016? Here are four trends that are poised to make an impact on how you do business.

### 1. DIGITAL DISRUPTION INTENSIFIES THE FOCUS ON PERSONALIZATION

Digital technologies have empowered consumers in unprecedented ways—and are disrupting customer service methodologies that have been in place since the dawn of the call center some 40 years ago.

Since technology will continue to evolve and carry customer expectations along with it, digital disruption will intensify. There's much more at stake than being able to conduct sales and service over multiple channels. The rules of customer engagement are changing quickly, and the challenge will be creating service environments in which the customer interactions you deliver are more engaging, relevant, personalized, and targeted than those delivered by your competitors. Expect self-service, online communities, and social customer service to gain strength as preferred pathways for customer service. The goal will be making it easier for customers—and the employees who support them—to get things done.

Engaging customers and providing them with rich and satisfying experiences means being able to deliver personalized, contextual service. You'll need the ability to collect, analyze, and present data efficiently from various systems, channels, and sources in a meaningful way—either to customer service staff as they deliver assistance, or to customers in self-service channels. This is the realm of customer engagement optimization solutions, which can reach across customer journeys, systems, and applications to deliver insight into the complete cycle of customer engagement. Look for customer engagement optimization to become the

Next Big Thing for enriching customer interactions, improving business processes, and optimizing the workforce.

### 2. SECURITY AND PRIVACY REMAIN FRONT AND CENTER

The rise of cybercrime and the penalties associated with noncompliance continue to make risk assessment and mitigation critical. Expect a steady increase in regulatory requirements, especially those pertaining to the safeguarding and use of personally identifiable information.

Although the financial services industry in particular faces formidable regulations concerning data security, all industries have similar concerns. This can pose a dilemma for CRM initiatives: As the need to deliver personalized service intensifies, so does the requirement to protect consumer privacy and security.

Customer engagement centers are understandably “ground zero” for potential consumer security issues. Voice biometrics can help centers screen large numbers of calls, detect fraudulent callers, and authenticate customers without impeding the flow of the interaction at hand. Other safeguards for enhancing compliance and security include protecting certain types of customer data from being viewed by employees—and restricting staff from being able to execute certain types of tasks, such as submitting forms on ecommerce sites.

### 3. ORGANIZATIONS BEGIN STRATEGIZING IN EARNEST ABOUT THE INTERNET OF THINGS

The Internet of Things (IoT)—through which everyday objects use sensors, IP addresses, and network connectivity to send data to people and other devices—holds many implications for CRM. From consumer goods to industrial equipment, the IoT can enable devices to send data independently. This opens the door to proactive customer service, through which, for example, a failing component in your car could send a signal to your local dealer or the car manufacturer, who could in turn contact you to schedule a repair or recall.

Essentially, products would come with built-in customer service.

The IoT is still in its infancy as manufacturers sort out interoperability issues. But it's coming. Now is the time to lay the foundation by implementing a unified platform for managing the knowledge, cases, processes, and data needed to deliver service—today, and as the IoT materializes.

### 4. COMPANIES GEAR UP FOR PREDICTIVE ENGAGEMENT

With the expansion of communication channels, rise of IoT, and escalating consumer expectations for faster, more responsive engagement, the sheer volume of data in play is exploding.

To use data to their advantage, savvy organizations will harness advanced technology in speech analytics, text analytics, and journey analytics to hone in on the drivers of customer effort and dissatisfaction, increased costs, and risk or non-compliance. Real-time guidance solutions—combined with knowledge and case management software—can help make this intelligence actionable and drive predictive engagement by providing employees and customers in self-service channels with information and next best actions for resolving issues. ■



**Ryan Hollenbeck** is Senior Vice President of Global Marketing for Verint Systems, a leading global provider of Actionable Intelligence® solutions. He is responsible for driving global corporate marketing, solutions and industry marketing, marketing communications and operations, digital marketing, and sales enablement. He also serves as executive sponsor of the Verint Customer Experience Program.

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# CRM in 2016: Retaining Your Most Valuable Asset – Your Customer

By Pierre Custeau,  
VP Product Management

It's been well established that retaining existing customers costs less and is far more profitable than acquiring new customers. In fact, it's been more than a decade since Bain & Co. revealed that increasing your customer retention rate by 5% increases profits by 25% to 95%.<sup>1</sup> The irony is, that while this is a generally acknowledged fact (one study shows 82% of companies agree) most are still more focused on customer acquisition than retention.

Increasing customer retention involves a company-wide shift to a customer-centric business model, where business decisions are made with customers' wants and needs top of mind. This requires changes in company culture, operations, and technology. Culturally, a company needs to have an "outside-in" perspective where the focus is on solving problems for customers, versus an "inside-out" view, where the focus is on products.

In order to win, you need to engage with your customers in a relevant and respectful way across their entire journey. This customer-centric approach **creates greater loyalty, more effective cross selling, lower attrition rates—and increased sales and profits.**

Moving to a customer-centric approach requires a significant commitment, including making cultural, operational, and technological changes. These changes should support a critical piece of the customer-centricity puzzle: ensuring that all customer-facing departments – including sales and marketing – are providing consistent customer experiences. This requires the right technology, one piece of which is a customer relationship management solution (CRM).

A CRM solution isn't a replacement for a solid customer retention strategy. However, it is the tool you need to implement your strategy. Here's what you can do with today's CRM solutions:

- Identify patterns and issues for customers who do leave—so you can make changes to avoid more customer churn.
- Personalize the customer experience, so that customers get information and offers that are relevant to them.
- Make the customer experience consistent, so that no matter who customers talk to, they get the same great experience.
- Anticipate customer needs to strengthen the customer relationship.
- Understand who your best customers are and who are likely

to be in the future, so that you can focus your efforts where you'll see the greatest return.

It's time to take another look at your CRM solution and help it break free from the walls of your sales department. Maybe you can better use what you have, or maybe it's time for an upgrade. Whatever the case, taking action to implement CRM to its full potential can help you build longer, more profitable customer relationships. ■



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**Infor CRM** is the platform of choice for companies strategically focused on customer engagements. Robust functionality, deep integration, and high flexibility in how you use and deploy your solution result in a solution that works the way you need it to. For more information on how Infor CRM helps drive customer engagement, visit <http://www.infor.com/product-summary/cx/infor-crm/>.

[1] The Economics of E-Loyalty, Harvard Business Review, July 10, 2000.



# Trends & Predictions for 2016

## THE RISE OF VOICE AS A SERVICE:

As our March 2015 [research](#) with Harris Poll showed, contact center agents are a critical lynchpin in the customer journey. Self-service and online options can only get the customer so far; at some point they will need to speak with a live agent. The study showed that 86% of U.S. adults ages 18 and older are very likely to switch to another company after a bad customer service experience. Furthermore, 81% prefer the assistance of a live representative via phone or online chat over self-service options when feeling dissatisfied with an order. These points highlight the importance of a company's ability to recover from a negative customer experience in order to retain that customer. What has also been made clear is that a skilled customer service agent is the key part of this customer retention equation.

As the importance of live customer service agents increases, so does the importance of voice quality. Recognizing this need, inContact launched Voice as a Service™ (VaaS) with its [Cloud Customer Interaction Platform](#) (CCIP) in September 2015. High quality voice is imperative to enabling better customer interactions. It can be extremely frustrating to have an interaction with an agent over a poor quality connection with garbled voice. IT executives and managers responsible for ensuring voice quality and availability spend a lot of their time troubleshooting and investigating issues with voice quality and often struggle to pinpoint the problem. Using inContact's VaaS offering they will be in a much better position to manage voice quality for their contact centers.

Additional inContact VaaS details:

- Carrier-grade, global, voice-optimized network
- The most flexibility and connectivity options from any contact center provider
- Published performance quality metrics
- Personalized dashboard for each customer organization

- Support teams enabled with detailed reporting & diagnostic tools
- Voice quality SLAs
- Quarterly 3rd party service audits

## OMNI-CHANNEL IMPORTANCE INCREASING:

Another key point from our Harris Poll study is that the majority of U.S. adults expect companies and ecommerce sites to have available at least six of the tested methods of communication during the online purchasing or ordering stage of the customer service journey, including both agent-supported channels and self-service options.

In order of importance to consumers, the agent-supported channels include:

- Email (93%)
- 1-800 to live reps (81%)
- Online chat (67%)
- Apps for mobile devices (50%)
- SMS/Text message (46%)
- Social networking sites (39%)
- Online video chat (32%)

Marketers have been buzzing about omnichannel for a couple of years now yet it is still a challenge. The disconnect often comes down to the technology. Put simply, the technology to have an omnichannel solution simply wasn't available. But, now with the advances in cloud-based technology, the shift to omnichannel is much more feasible. Gone are the days when companies would have to buy expensive hardware to meet customer demands only to find it obsolete in a few short years. The cloud allows for agility in adopting new technology innovations.

As part of the CCIP release, inContact continues to enhance its Omnichannel Interactions with cloud multimedia routing for all customer interactions, including traditional inbound / outbound voice channels, voicemail, email, chat, work items, IVR, voice portal and self-service. Additionally, newer channels such as

Social Media and SMS are available. These omnichannel options are available with pre-built integrations and APIs for CRM, Unified Communications and other inContact ecosystem partners.

## THE INCREASE OF WORKFORCE OPTIMIZATION ADOPTION BY THE SMB MARKET:

Workforce Optimization (WFO) enables contact centers to be more efficient and cost effective. It is one of the most appropriately named business advancements as it literally *optimizes* the *workforce*. What contact center, regardless of size, isn't looking to be more effective and efficient?

The mid-market contact center (between 25 and 150 seats) is the world's fastest growing segment. Large companies are moving towards smaller, multi-site and home-based operations. Meanwhile, fast growing medium-size companies with 100 – 1000 employees are also creating new contact centers. This segment has historically been underpenetrated by WFO, as premise solutions were too pricey and complex. But as smaller centers expand into more multi-channel service, the value proposition for WFO becomes more compelling.

As part of the CCIP release, inContact continues to improve its WFO offering with a robust suite of tools in the cloud to help organizations transform the quality of customer interactions by improving agent performance, by optimizing operations and by intelligently automating actions and assignments between workforce optimization applications (WFO) and the core contact center ACD and routing engine. ■

inContact is the cloud contact center software leader, helping organizations around the globe create high quality customer experiences. For more information, visit [www.inContact.com](http://www.inContact.com) or call 1-866-965-SaaS.

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