Executive Bootcamp (Part 1)
Engaged Customer Strategy – Your Roadmap to Success to 2030

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Barton Goldenberg

- President & Founder of ISM, Inc.
- Since 1985, ISM has created & implemented Customer-Centric strategies
- Headquartered in Bethesda, Maryland

Awards & Featured Publications
- One of the first three inductees into the CRM Hall of Fame
- Has been featured in Wall Street Journal, USA Today, CIO Magazine, Direct Marketing News, CRM Magazine and many others

Author
- “CRM in Real-Time” (2008)
Specializing in Creating & Implementing ‘Customer-Centric’ Strategies Since 1985

➢ Perform Executive Briefings
➢ Perform Assessments
➢ Create Strategies
➢ Implement strategies

Goal: Help achieve high user adoption & meaningful business impact
Sample ISM Customers
To Learn More About ISM’s Services

Come visit the ISM exhibition booth on the show floor

Booth #206
Engaged Customer Strategy

#CRMevolution
Challenge: The Amount of Data Available Continues to Grow

2016
11B Devices
250bn 32GB Smartphones

2020
30B Devices
88bn years of music files
686bn 64GB tablets
1.4bn years of HD video

2025
80B Devices

Via IDC
77% of businesses state that **digital transformation** is their first strategic priority

Source: Altimeter 2016

**Goal: Capture, retain and grow customers awash in the digital sea**
Why Do Some Thrive Better in the Digital Deluge?

Lost their way…  Learning their way…  Leading the way…
‘Engaged Customer’ Strategy

Holistic Customer Profile

Identity Resolution (integrate on-line and off-line data)

- Transactional Data
- CRM Data
- Third-Party Data
1954 Jaguar XK120

1983 Jaguar XK6 (Series 3)
Proud Owner of three Classic Jags

1989 Jaguar XJS (V12)

1999 Jaguar XJ8 (Vanden Plas)

2013 Jaguar XJL (AWD)
Enjoy Racing in the Jaguar Slaloms
Love to Participate in Jaguar Car Events
Subscriber to Several Jaguar Magazines
Member of NCJOC

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Contact JCNA at 888 258 2524 or email admin@jcna.com

JAGUAR JOURNAL

Reflections on Vancouver, an AGM of Note
And then there were three – 1951 XK lightweights
Smiths instruments, as seen from inside
XK8 satellite navigation deletion
Visitor to Multiple Jag Website
Visitor to Global Automotive Social Media Sites

Step #1
Social Cloud
Public and Private Communities

Step #2
Social Media Monitoring & Filtering

Step #3
Integration with Social CRM

Step #4
Customer Engagement
The Obvious Question

Shouldn’t Jaguar know Barton is an enthusiast?
The More Important Question

Shouldn’t Jaguar know Barton is an enthusiast?

Shouldn’t Jaguar know that Barton is in the market for an F-Type?
Target loyal customers or prospects to engage with offline and online, personalize, and then measure the impact of your sales and marketing campaigns.
‘Engaged Customer’ Strategy

Holistic Customer Profile

Identity Resolution (integrate on-line and off-line data)

Transactional Data

CRM Data

Third-Party Data
Holistic Customer Profile

- Marketing
- Contact Information
- Alerts
- Activities
- Products Purchased
- Financial Information
- Quotes
- Sales Opportunities
- Customer Service
- Dealer Information
- Digital Insights
‘Engaged Customer’ Strategy

Holistic Customer Profile

Identity Resolution (integrate on-line and off-line data)

Transactional Data  CRM Data  Third-Party Data

Listening & Data Analytics Platform
Analytics Always Will Be Challenging

46% Lack ability to integrate digital and offline

44% Too many data sources

38% Access to technology to manage data source integration

Source: Forrester Research

We just can’t get an *omni-channel* view of consumers…
‘Engaged Customer’ Strategy

Holistic Customer Profile

Identity Resolution (on-line and off-line data)

Transactional Data
CRM Data
Third-Party Data

Listening & Data Analytics Platform

Traditional Media
Social Media
eCommerce
Emerging Technologies

Emerging Technologies
Traditional Media
Social Media
eCommerce

Identity Resolution (on-line and off-line data)
## Most Popular Channels (2016)

<table>
<thead>
<tr>
<th>Channel Type</th>
<th>Generation Y</th>
<th>Generation X</th>
<th>Baby Boomers</th>
<th>Silent Generation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet / Web Chat</td>
<td>24%</td>
<td>21%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Social Media</td>
<td>24%</td>
<td>12%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>SMS</td>
<td>21% (3rd choice)</td>
<td>28%</td>
<td>24% (2nd choice)</td>
<td>6% (2nd choice)</td>
</tr>
<tr>
<td>Smartphone Application</td>
<td>19% (4th choice)</td>
<td>11% (5th choice)</td>
<td>3% (4th choice)</td>
<td>1% (5th choice)</td>
</tr>
<tr>
<td>Telephone</td>
<td>12% (5th choice)</td>
<td>29%</td>
<td>64%</td>
<td>90%</td>
</tr>
</tbody>
</table>

Source: KPCP Internet Trends 2016
‘Engaged Customer’ Strategy

Customer Acquisition, Retention & Growth

Traditional Media  Social Media  eCommerce  Emerging Technologies

Listening & Data Analytics Platform

Holistic Customer Profile

Identity Resolution (on-line and off-line data)

Transactional Data  CRM Data  Third-Party Data
Get the People, Process, Technology Mix Right

People
50%

Process
30%

Technology
20%
New Skill Requirements

• The “creative” marketer/salesperson: needs to determine how to secure more real-time, on-line and off-line data coming from brand loyal customers sensitive to privacy issues...

• The “technical” marketer/salesperson: needs to harness more real-time on-line and off-line data coming from external sources & new tools and deliver smarter decision making...
It’s All About Collaboration

Think

Marketing/Sales  Technical
Determine the optimal sales, marketing and customer service processes that engage your customers at each touchpoint of their journey.
Design ‘Outside-In’

Knowing your digital customers so well that you are able to anticipate what they need, what products/services you should be offering and/or developing for them, and how best to service them.
Be ‘in-the-know’ re: technologies that help ensure you are able to optimally engage your customers
Customer Journey Begins Before First Sales Contact

The Customer Journey Before and After the First Personal Contact

CUSTOMERS’ DIGITAL USAGE DURING THE BUYING PROCESS

First personal touch point

Sources: Survey on digitization in sales in cooperation with the Ruhr University of Bochum (Germany), December 2016; BCG analysis.
Note: There were 723 European and global companies in the survey.
Part 1: Engaged Customer Strategy: Closing Comments

- More data, more technologies, more complexity that ever before
- Must be able to connect data across technologies, channels, devices
- Will your company follow Borders, illy, or Amazon’s future?
- **Suggestion:** Get the big picture right; conduct an ‘Engaged Customer’ Strategy assessment → a multi-year roadmap
- Prioritize roadmap activities on ability to achieve measurable results
- Remember the critical mix: people/process/technology
Closing Comment

ISM would be honored to guide the creation & implementation of your Engaged Strategy or any of its components; thank-you for visiting us in Booth #409 if you would like to continue the dialog...
The Central Role of CRM in an Engaged Customer Strategy
Connect with ISM

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Customer Centric Business Strategies Blog
http://ismguide.com/blog/

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Booth #206
Discussion Time