

A DYNAMICSCON PRESENTATION



POWERED BY  DUG

DYNAMICSCON VIRTUAL

MARCH 2023

CUSTOMER
ENGAGEMENT

DYNAMICSCON.COM

JC Quintana

JC is a veteran of the CRM industry and the author of two best-selling books on Customer Strategy and Relationship Psychology. He is an adjunct professor of Customer Experience and Design Thinking at 14 U.S. universities and leads the Value Acceleration practice at congruentX.



**Don't Call it
CRM...
unless you mean it**

JC Quintana



A Brief History of CRM



2010: Proliferation of Software Providers.

2010

2000: Cloud-based and Social CRM gain acceptance.

2000

1999: SaaS and Mobile CRM launched.

1999

1995: The term Customer Relationship Management was coined.

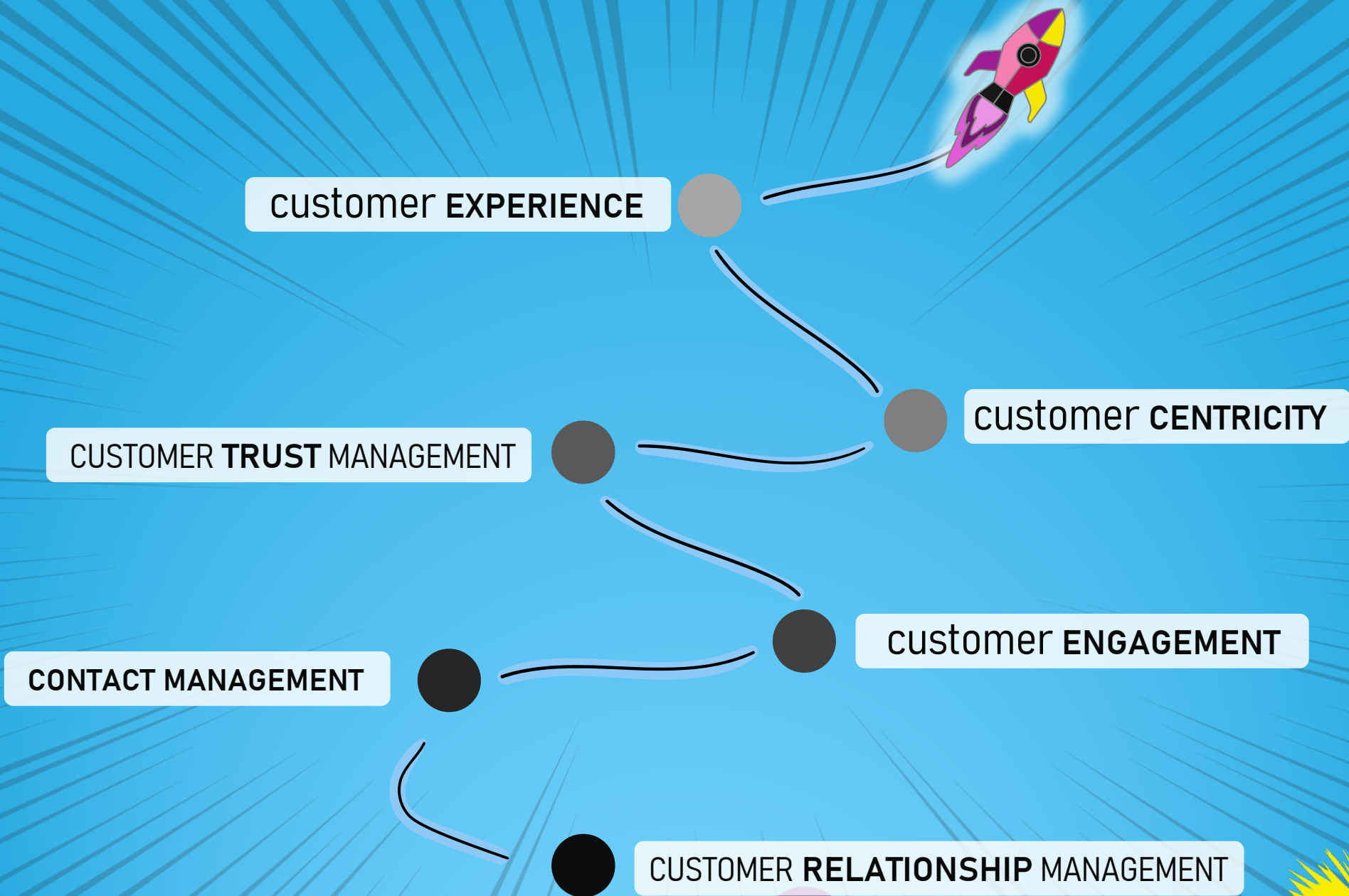
1995

1990: The birth of Sales Force Automation

1990

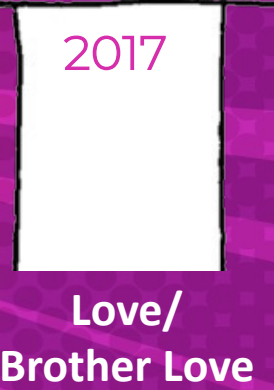
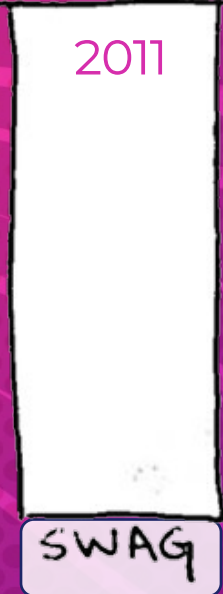
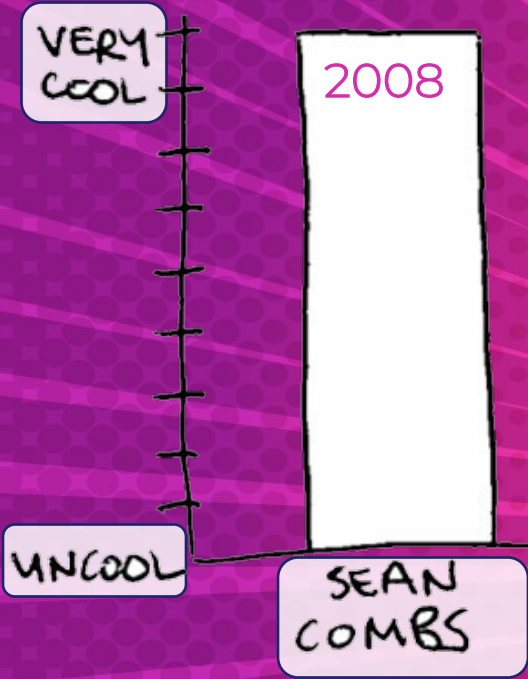
1987: ACT! And the birth of Contact Management Software

1987

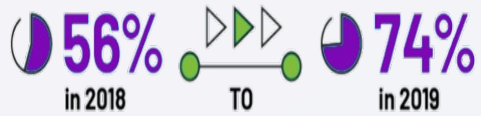


THE NAMES OF SEAN COMBS

WHY?
POPULARITY
BAD PRESS



Overall CRM usage increased from



91% of companies with more than 11 employees use a CRM system



73% of customers point to customer experience as an important factor in their purchasing decisions

“We definitely have one!”

Do CRM Tech Fail Though?



50% of teams improved their productivity by using a mobile CRM



Up to 41% increase on revenue thanks to CRM applications, per sales representative



“The technology actually works”



CRM can boost conversion rates by 300%



\$1



\$8.71

Every dollar spent on CRM has an average ROI of \$8.71

CRM systems are known to improve customer retention, by as much as

27%

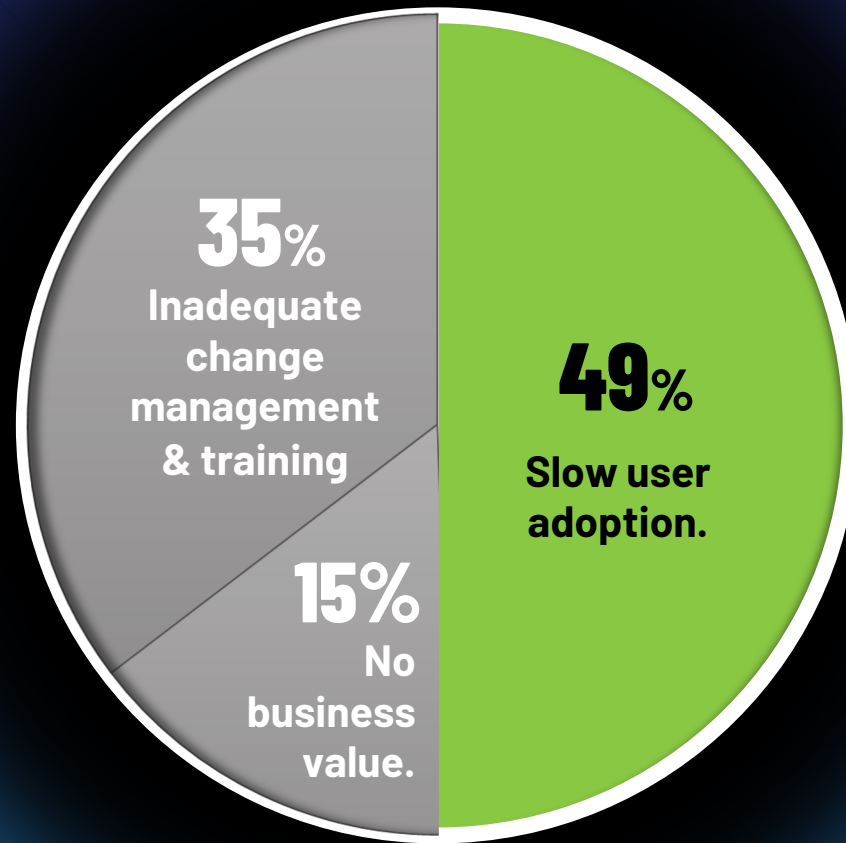


A mere 5% increase to your customer retention efforts can increase profits by between

25-95%

“It does help win and keep customers!”

the real challenge...





It's those seven words again!

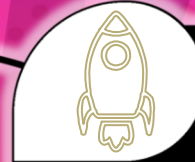
Customer Relationship Management

1. Define & align our value to the RIGHT customer



Needs, Rewards, Cost, Outcome, Equity

7. Improve Customer Experience & Loyalty



Experience, Emotion, Feelings, Context

2. Understand characteristics & circumstances



Characteristics, Circumstances, Capacity, Culture

6. Manage Transparency & Trust



Accessibility, Honesty, Candor, Trust

3. Measure engagement & value co-creation



Responsiveness, Curiosity, Discovery, Investigation, Value Co-Creation

5. Deliver Knowledge & Skills



Skill, Ability, Mastery

4. Sustain Accountability & Ownership



Responsibility, Willingness, Obligation, Commitment, Ownership

So...

If you are going to call it
**Customer Relationship
Management**
Make sure it is managing
Relationships...



To Manage **Relationships**, You Must Manage...

Customer Value...

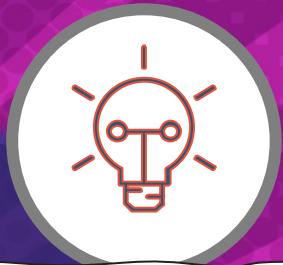


Functionality in CRM System:

- Who are my best customers/customer segments?
- How much value do I deliver to them?
- What value do I give each customer?
- How much time do I spend doing that?
- How do I reiterate my value to customers?
- How do I communicate additional value?

To Manage Relationships, You Must Manage...

Customer Value...



Functionality in CRM System:

My Open Opportunities by Relationship								Edit columns	Edit filters	Search this view
Topic	Est. Re...	Relationship Health State (KPI)	Relationship Health ...	Account	Time Spent by T...	Time Engaged with Cust...	Last Updated (KPI)			
5 Café A-100 Aut...	\$107,500....	Good	Improving	Trey Rese...	3.3	3.3				
50 Café A-100 Au...	\$95,000.00	Good	Steady	Trey Rese...	0.0	0.1				
3 Café Grande Es...	\$44,700.00	Good	Declining	A. Datum...	3.3	3.3				
2 Semiautomatic...	\$39,800.00	Good	Improving	A. Datum...	3.3	3.3				

My Open Leads by Relationship						Edit columns	Edit filters
Name	Topic	Relationship Health State (KPI)	Relationship Health ...	Parent Account fo...	Time Spent by T...		
Gabriela Christian...	5 Café Gr...	Good	Steady	A. Datum Corpor...	0.5		
Ivan Cashin	15 Airpot...	Poor	Steady	Northwind Traders	0.1		
Lavona Field	15 Airpot...	Good	Steady	Fabrikam, Inc.	0.6		
18 Airpot Coffee ...	\$7,182.00	Good	Improving	Northwin...	3.3	3.3	
1 Café BG-1 Grin...	\$4,999.00	Good	Improving	Alpine Sk...	0.3	0.3	
10 Airpot XL Coff...	\$4,990.00	Good	Improving	Alpine Sk...	3.3	3.3	

To Manage Relationships, You Must Manage...

Customer Centricity



Functionality in CRM System:

- How do they differ culturally?
- What is the impact of language?
- What is the impact of corporate culture?
- What is the impact of values and worldview?
- Can I be predictive best on customer-specific needs, characteristics, circumstances, and capacity?

To Manage Relationships, You Must Manage...

Customer Centricity



Functionality in CRM System:

Customer Insights

Overview | Awareness | Explore | Buy | Service

Patti Melendez
Project manager
Customer since 4/2013
Last activity: 7/1/18 | Last purchase: 4/16/18

Gender: Female
Family status: Married
Address: 1108 23rd Ave S, Seattle, Washington, USA

Interests (similar generic predictive profile)
Sports and Recreation: 92 (100 pt. scale)
Health and Fitness
Auto Insurance

Brand affinities
Alpine Ski House
Contoso Suites
Fabrikam, Inc

Lead Configuration: LeadsOnTheWestCoast
Properties:
Segment name: LeadsOnTheWestCoast
Audience Type: Customer: Customer360
Status: Active
Created on: 2/7/19, 12:52 AM
Created by: nichole@contoso.com

Group 1: Filter defined using Leads : Dynamics365ForSales entity

- Leads : Dynamics365ForSales State is California
- Or Leads : Dynamics365ForSales State is Oregon
- Or Leads : Dynamics365ForSales State is Washington
- And Customer : Customer360 (Leads : Dynamics365F... All records

Awareness
86 Engagement score
36 Activities

Explore
4 Open leads
64% Qualification rate

Buy
\$544 Lifetime value
\$160 Last purchase
\$1.44k In-process sales

Website visit - 8/4/18, 6 min
New order placed.

To Manage Relationships, You Must Manage...

Customer Engagement



Functionality in CRM System:

- How much engagement do they expect?
- How much engagement is happening and what does it mean?
- What motivates them to co-create value?
- What is their preferred communication channel?

To Manage Relationships, You Must Manage...

Customer Engagement



Functionality in CRM System:

IC Ivan Cashin - Saved
Lead - Sales Insights

Lead to Opportunity Sal...
Active for 12 months

Qualify (12 Mo)

Summary Relationship Analytics Details Related

Summary Relationship Analytics Details Related

Client's contacts Last updated: 31/01/2023 18:07

- Yvonne McKay (sample) 1 2 1
- Nancy Anderson (sample) 1 1 1
- Scott Konersmann (sample) 1 2 0

Your colleagues Last updated: 31/01/2023 18:07

- Jason Smith 1 2 1
- Nancy Anderson 1 1 2
- Roni Jacob 1 2 0

Customer interactions Last updated: 31/01/2023 18:07

Compare interactions with the customer
Learn more about the interactions you've had with your customers.

Interaction Type	By Us	By Them
Emails	4	3
Meetings	5	3
Phone calls	5	3

Email engagement Last updated: 31/01/2023 18:07

Do you need to work on your emails?
Summarize your customers' email engagement with the emails sent by your sellers.

Metric	By Us
Emails opened	2%
Attachments viewed	3%
Links clicked	1%

Email send/receive ratio Last updated: 31/01/2023 18:07

Stay responsive and seal the deal
Compare your email send/receive ratio to the ratio of the customer.

Party	Ratio
By Us	1%
By Them	1%

Relationship activities Last updated: 31/01/2023 18:07

Date	Activity	Count
4 Dec	Phone calls received	1
5 Dec	Phone calls made	1
6 Dec	Phone calls received	1
9 Dec	Phone calls received	1
14 Dec	Phone calls received	1
15 Dec	Phone calls received	1
17 Dec	Phone calls received	1
18 Dec	Phone calls received	1
19 Dec	Phone calls received	1
20 Dec	Phone calls received	1
20 Dec	Meetings received	2
24 Dec	Phone calls received	1
25 Dec	Phone calls received	1
26 Dec	Phone calls received	1
28 Dec	Phone calls received	1
29 Dec	Phone calls received	1
30 Dec	Phone calls received	1
31 Dec	Phone calls received	1
1 Jan	Phone calls received	1
2 Jan	Phone calls received	1
3 Jan	Phone calls received	1
4 Jan	Phone calls received	1
5 Jan	Phone calls received	1
6 Jan	Phone calls received	1
7 Jan	Phone calls received	1
8 Jan	Phone calls received	1
9 Jan	Phone calls received	1
10 Jan	Phone calls received	1
11 Jan	Phone calls received	1
12 Jan	Phone calls received	1
13 Jan	Phone calls received	1
14 Jan	Phone calls received	1
15 Jan	Phone calls received	1
16 Jan	Phone calls received	1
17 Jan	Phone calls received	1
18 Jan	Phone calls received	1
19 Jan	Phone calls received	1
20 Jan	Phone calls received	1
21 Jan	Phone calls received	1
22 Jan	Phone calls received	1
23 Jan	Phone calls received	1
24 Jan	Phone calls received	1
25 Jan	Phone calls received	1
26 Jan	Phone calls received	1
27 Jan	Phone calls received	1
28 Jan	Phone calls received	1
29 Jan	Phone calls received	1
30 Jan	Phone calls received	1
31 Jan	Phone calls received	1
1 Feb	Phone calls received	1

Who Knows Whom

Tricia Potter
Strong Connection Strength

IT Manager, Contoso
someone@email.com

Get Introduced

To Manage Relationships, You Must Manage...

Customer Accountability



Functionality in CRM System:

- Are we meeting our obligations?
- Does the customer believe we are?
- Is the customer meeting their obligations?

To Manage Relationships, You Must Manage...

Customer Knowledge



Functionality in CRM System:

- Does the customer have the knowledge they need?
- About us?
- About our products and services?
- Do they know where to get it?
- Do we have the skills/mastery they expect?

To Manage Relationships, You Must Manage...

Customer Transparency



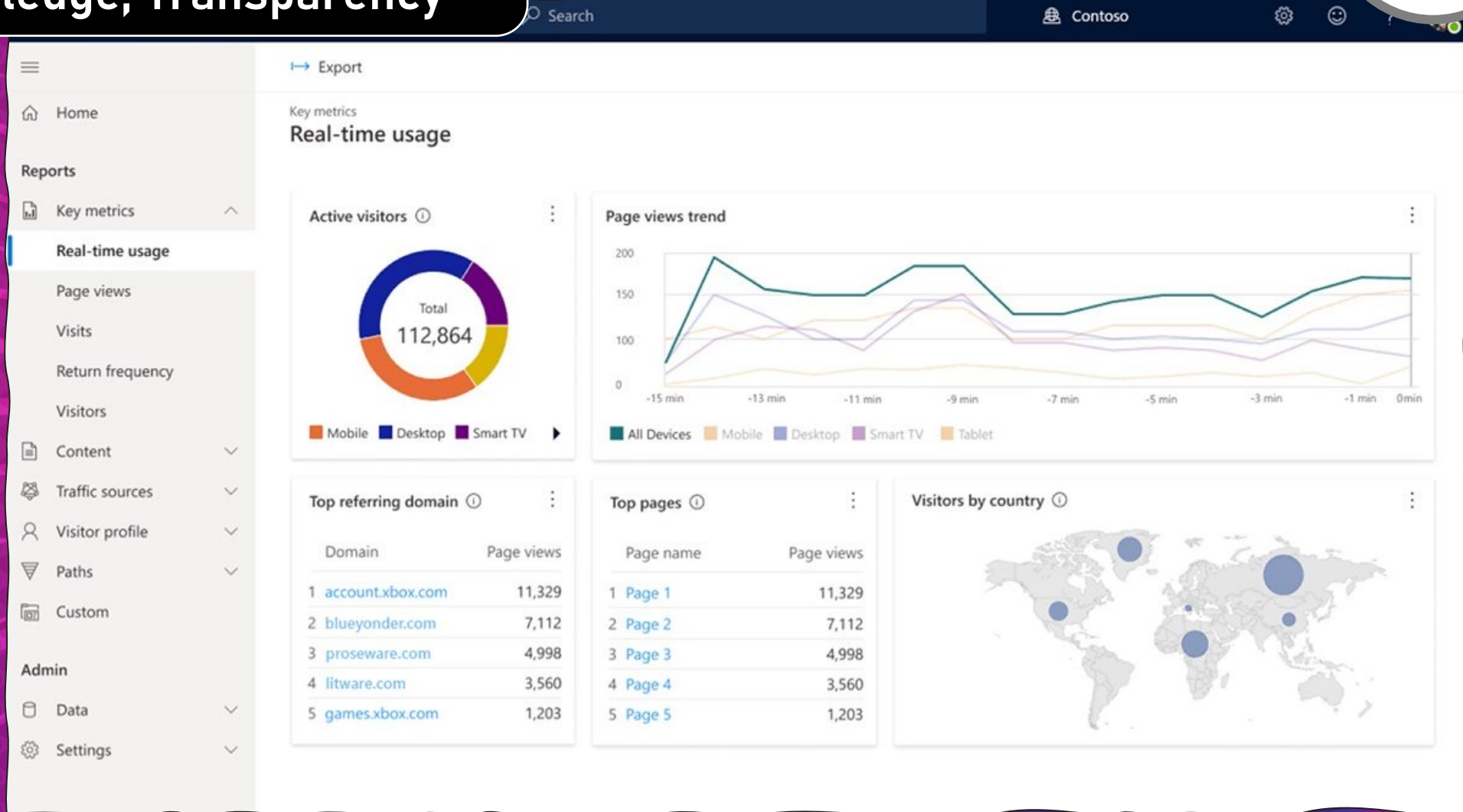
Functionality in CRM System:

- How much is the right amount?
- Are they getting it?
- What is creating the appearance of dishonesty?
- What is the level of trust?

To Manage Relationships, You Must Manage...

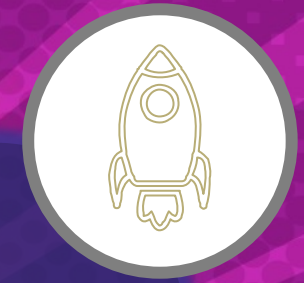
Customer Accountability, Knowledge, Transparency

Functionality in CRM System:



To Manage Relationships, You Must Manage...

Customer Experience

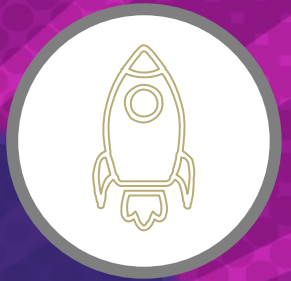


Functionality in CRM System:

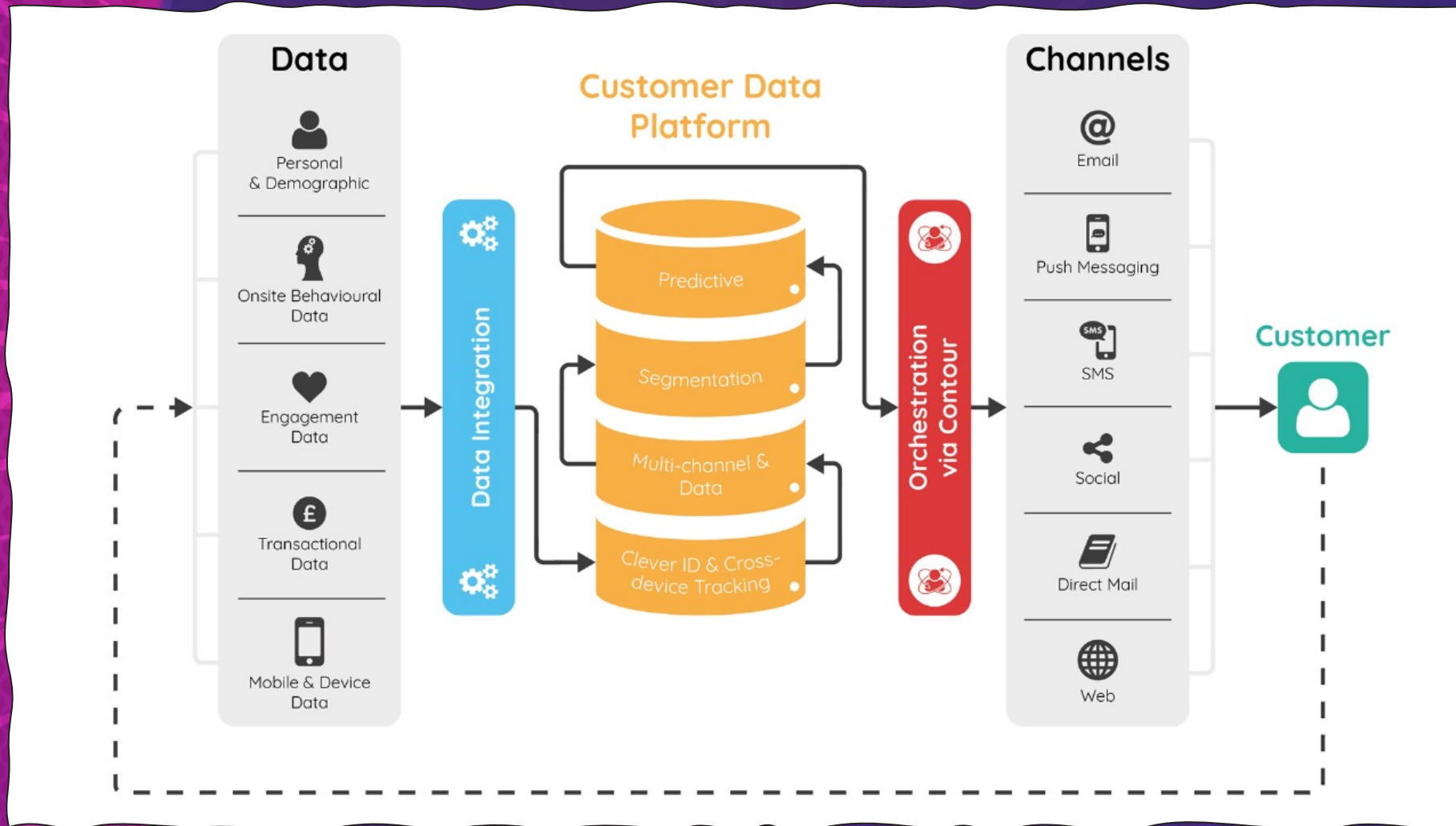
- What are the weak points in the Customer Journey?
- What lacks effectiveness?
- What lacks functionality?
- What lacks ease?
- What lacks accessibility?
- What lacks enjoyment?
- What lacks emotional context?

To Manage Relationships, You Must Manage...

Customer Experience



Functionality in CRM System:





Thank You

JC Quintana

jcquintana@congruentX.com

 [jcquintana/](https://www.linkedin.com/in/jcquintana/)


PEOPLE | TECHNOLOGY | ALIGNED