CRM

November 15, 2017

Written by: Brian Cantor

This report will provide guidance for building a CRM strategy that actually creates value for customers. It will then pay attention to the **four pivotal questions** that determine the success or failure of a CRM framework.

Presented by:

avtex

Index:

Contributors:

This CCW Digital Special Report features insights, anecdotes and perspectives from several leading customer management executives and thought leaders.

John Seeds
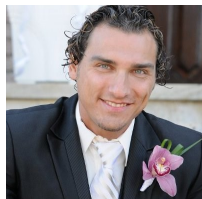Senior Marketing Director
Avtex

Dion Davis
VP Solution Center Manager
Flushing Bank

Erin Geddes
GM PZ Customer Care
Schneider Electric

Johnny Russo
AVP, Ecommerce and Digital Marketing
Mark's Work Warehouse

CRM: Fundamental Strategy for A Pivotal Objective

"We are in the era of customer centricity."

"Treat your customers as people rather than numbers."

"Customer experiences are about journeys, not individual interactions."

"Focus on connections rather than transactions."

Each of these adages is undoubtedly familiar to customer contact professionals. Moreover, each of these adages speaks to the importance of driving customer relationships.

Great relationships represent a fundamental goal of customer experience strategy. When a business can transform from an organization that *supplies* a product into one with which customers meaningfully connect, it stands to reap considerable benefits.

It will benefit from an increase in repeat business; customers who feel *connected* to a brand are more likely to consider it for future purchases.

It will enjoy an increase in word-of-mouth advocacy; customers who believe in a brand are more likely to promote its offerings to their friends, colleagues and social networks.

It will gain a line of defense against competitors; customers who value the brand itself (not just its products) are much more resistant to marketing from other providers.

Mindful of these benefits, organizations routinely identify customer relationships – and loyalty metrics like retention rate and Net Promoter Score – as top organizational priorities.
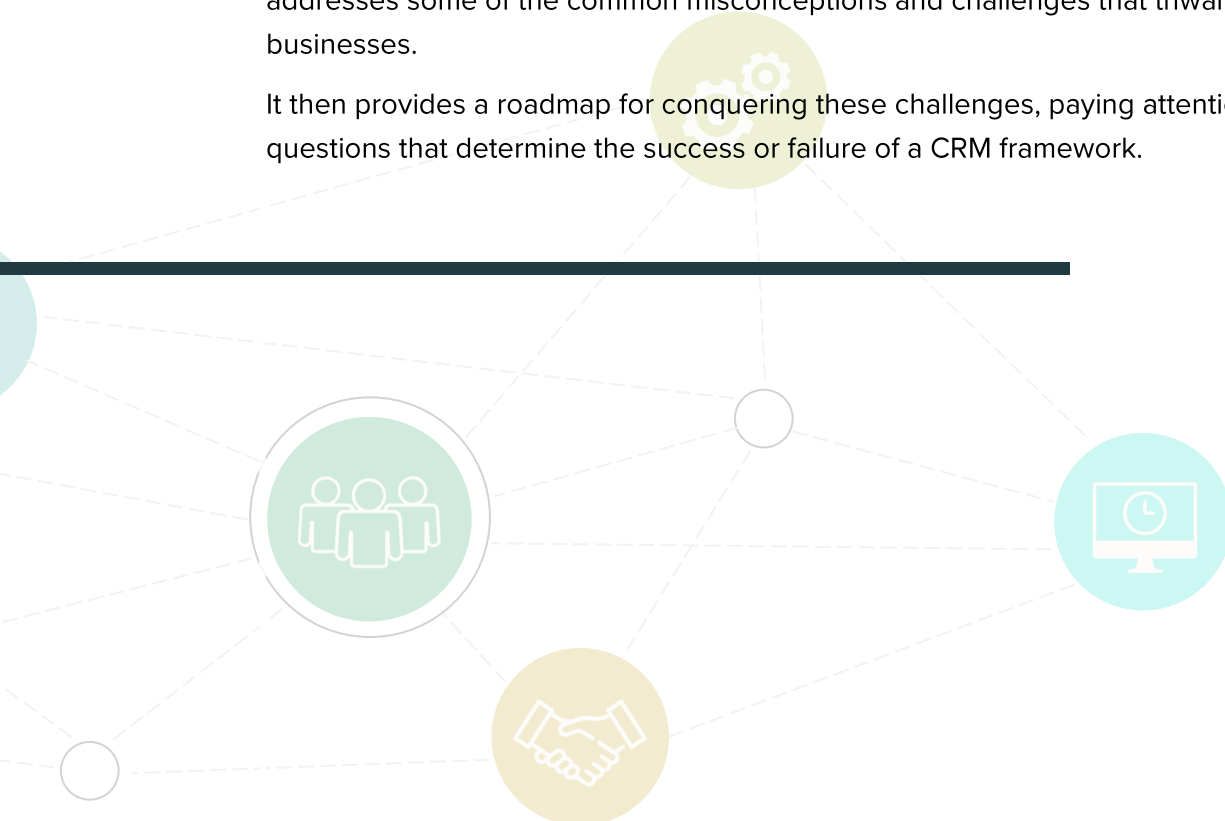
They, moreover, view "customer relationship management" (CRM) as an absolute cornerstone of their customer contact function. While some businesses refrain from investing in robust technologies, nearly all have some framework for tracking and managing customer relationships. Whether in the form of a simple spreadsheet or a large-scale suite like Salesforce or Microsoft Dynamics, CRM solutions are a staple of the modern contact center.

This universal recognition of importance is not, however, translating into a universal guarantee of success. Nearly all businesses appreciate the concept of a CRM strategy, but a decidedly smaller quantity currently approaches CRM from a valuable, customer-centric, agent-centric perspective.

This report will help bridge that gap. It will provide guidance for building a CRM strategy that actually creates value for customers – a prerequisite for cultivating meaningful relationships.

Alongside statistical context for CRM's importance in today's era of customer centricity, the report addresses some of the common misconceptions and challenges that thwart success in many businesses.

It then provides a roadmap for conquering these challenges, paying attention to the four *pivotal* questions that determine the success or failure of a CRM framework.

CRM: Don't Ignore the "RM"

When it comes to the customer contact space, few terms are more familiar than "CRM." Customer contact professionals universally recognize the abbreviation. They know it stands for customer relationship management. More importantly, they understand the importance of cultivating great customer relationships.

Unfortunately, many customer contact leaders forget this knowledge when actually sourcing, implementing and administering CRM solutions.

These leaders mistake customer relationship management for "customer interaction recording."

They may license powerful "CRM" solutions for their contact centers, but they do not leverage these tools to cultivate strong customer relationships.

They instead focus exclusively on the reporting component. Urging agents to properly submit interaction data into the system becomes their primary, if not only, objective.

In addition to fundamentally missing the point of CRM, this approach creates clear inefficiencies and clear sources of agent dissatisfaction. More importantly, it hinders the organization's ability to do the very thing it set out to accomplish: improve customer relationships.

"Time is money" in the contact center, but its value is squandered when agents are assigned low-value tasks. "Customer interaction recording" is one of those tasks.

No, there is nothing fundamentally wrong with asking agents to chronicle their interactions in the CRM system. The health of the customer experience, in fact, depends on active input from front-line employees.

The error comes when the business makes "data entry" the priority for CRM strategy. In doing so, the organization is asking agents to spend time away from customer interactions (their quintessential "high-value task") – without any guarantee of a return on that investment.

The data agents input has no inherent value; it is information they already know about interactions that have already happened. This "tracking data" may help leaders manage agent workflow in its native state, but it neither improves the customer experience nor aids agents in better contributing to that experience.

Without that promise of value, the organization is wasting its agents' time – and thus succumbing to a potentially costly inefficiency. It may also be hurting agent satisfaction; few agents enjoy pointless data entry, and they may downright resent the task if it is used to micro-monitor – rather than empower – their workflow.

The organization, more importantly, is hindering its ability to build meaningful customer relationships. Data holds the keys to anticipating needs, personalizing experiences and reducing pain points, all of which contribute to better relationships. None of these benefits can be realized, however, if the intelligence remains in a dormant state.

> Does the system exist to collect data that most agents and sales reps already know, or does the system exist to provide value to the agent and sales rep and enable them to serve the customer," asks John Seeds of Avtex. "Unfortunately we see most organizations implementing CRM systems to capture more customer data and activity data (in a 'big brother' context) than we do providing value to the agent."

True "CRM" is not about chronicling this data itself. It is about the process of transforming the data into actionable intelligence that empowers agents to empower customers.

This process involves pairing agent insights with customer feedback, analytics and other "whisper" data from all touch points. Once this real-time, universal data flow is established, the CRM solution must then parse the data into intuitive, useful narratives for live agents and self-service engagement platforms.

It should provide vivid insights into the profiles, histories, sentiments and preferences of individual customers. It should also provide aggregate insights that help the organization anticipate how other customers may behave over time.

When the data reaches this stage, agents have what they need to deliver better experiences and build stronger relationships. Agents will be happier and more productive. Both work to the benefit of customers – and the business.

Integrated CRM Takes Center Stage

Insofar as customer relationships represent a key objective for contact centers, CRM solutions presumably represent a pivotal investment focus.

A recent CCW Digital study substantiates this presumption.

Nearly 69% of businesses identify CRM as an investment priority for the next two years, and 45% view CRM solutions as an urgent focus.

As significant as the data is at face value, it is even more telling in context.

Most organizations already have *some* framework for managing customer relationships. They also face numerous other challenges and have many other objectives.

The fact that CRM *still* ranks as a pivotal investment priority speaks volumes about its perceived importance. Organizations know they can improve their existing CRM strategies. More notably, they believe they must make those improvements in the immediate future.

What type of improvement are businesses seeking?

In many cases, the answer is integration.

> "
> I'm trying to bridge the gap between the contact center system that we use and the CRM system that I would like to have implemented," says Dion Davis of Flushing Bank. "I feel like the merging of the two is what will have the CRM piece working as fluently as possible."

Disintegrated systems are the most common productivity challenge facing organizations. A whopping 25% of businesses actually identify integration issues as their *greatest* reason for poor productivity.

Facing this challenge, many organizations are turning their attention to omnichannel CRM solutions. Fifty-eight percent of businesses call omnichannel CRM solutions an investment priority; 28% view the category as an urgent focus.

Not simply associated with poor productivity, disintegrated and/or complicated systems – particularly when it comes to CRM – adversely impact the overall agent experience.

"Making systems easier to use" represents the #3 agent experience for 2018; only "improving coaching" and "improving the knowledgebase" rank as more significant priorities.

Optimizing CRM, specifically when it comes to usability, is the #6 agent experience priority.

Given that "agent happiness" ranks as the #3 contact center performance priority (below only customer satisfaction and loyalty), efforts to improve the agent experience are naturally taking center stage.

CRM integration is a shining example of such an effort.

The data confirms that organizations are not simply prioritizing CRM investments due to an abstract interest in customer relationships. They believe an integrated, accessible CRM solution yields a better, more productive contact center environment.
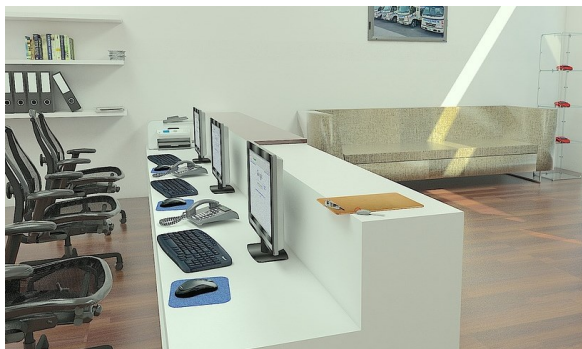
What Matters When CRM Matters

Great CRM solutions are springboards for more meaningfully connecting with customers. They also yield happier, more productive agents.

Ultimately, they are *means* rather than ends.

CRM is designed to achieve core customer experience (and business) objectives.

To determine the optimal CRM approach, it is imperative to understand these key objectives.

For those pursuing CRM as an investment focus in 2018, "customer journey mapping" represents the most common customer experience focus. 44% consider journey-mapping a top focus for the coming year.

Other key focuses include improving voice of the customer strategy (42%), reducing customer effort (41%), chatbots and other automation technology (41%) and productive personalization (41%).

CRM strategy factors heavily into all five objectives.

1 By helping to analyze pain points, uncover opportunities and anticipate future actions, CRM plays a key role in journey mapping.

2 By transforming aggregate data from feedback surveys, social media chatter, interaction analytics and behavioral changes, CRM has a marked impact on voice of the customer strategy.

3 By not only chronicling data about pain points but providing agents and systems with the insights they need to better serve customers, CRM yields frictionless experiences.

4 By driving the intelligence bots use to communicate (and managing the data they collect), CRM factors heavily into an AI-driven contact center.

5 By providing agents and systems with insights they need to quickly tailor conversations and resolutions to customers, CRM fosters a productive form of personalization.

CRM: Four Fundamental Questions

The value of CRM strategies comes not from their ability to *document* customer relationships but from their ability to empower them.

To measure this value, organizations should ask four questions about their approach to CRM.

1 Does it strengthen the customer experience?

2 Does it improve the agent experience?

3 Does it capture and empower the *entire* customer experience journey?

4 Does it tell a story?

If a business can truly answer these four questions in the affirmative, it has embarked on the right track regarding CRM.

DOES IT STRENGTHEN THE CUSTOMER EXPERIENCE?

At the end of the day, the customer contact function is aiming to deliver a better customer experience.

An effective CRM strategy assists with that objective.

It empowers a business to deliver the experiential elements that actually matter to customers. Instead of imposing limitations on customers, the business will be providing legitimate value.

As a result, it will be in position to make meaningful, lasting connections.

While quantifying the precise impact on the customer experience is difficult, one can evaluate the fundamental customer centricity of a CRM solution.

A customer-centric CRM solution will help a business meet five fundamental customer demands.

PERSONALIZATION:

Productive personalization is a top customer experience priority for 2018. Businesses also identify "personalization" as the *defining quality* of a customer-centric brand.

Personalization is, quite simply, crucial for today's businesses. The ability to foster personalized experiences is, accordingly, a critical requirement for a CRM strategy.

A desire to better personalize relationships is, in fact, the *driving force* behind Mark's Work Warehouse's interest in CRM technology.

> " Think of when you go into a store; you grab something - you leave," explains Johnny Russo, AVP of eCommerce for Mark's, regarding the retail industry's historical lack of emphasis on CRM technology.

His organization's goal is to break from that habit. Mark's aims to leverage CRM to better personalize customer care and marketing.

> " Some of the CRM solutions aren't the greatest for on-site personalization," acknowledges Russo regarding the marketplace. He is nonetheless seeking a solution – or a group of solutions – that can make personalization a reality.

All organizations must join that quest.

Rather than simply collecting customer data, CRM solutions must present agents and systems with relevant, actionable insights about individual customers at key moments of truth.

If it does not provide agents with immediate access to relevant details about customers and their issues, the CRM solution is broken.

REDUCING EFFORT:

Reducing customer effort is the #1 customer experience priority for all businesses and the #3 priority for active CRM buyers. Businesses believe "frictionless" experiences better reflect customer centricity than "memorable" ones.

Effective CRM strategies *must* help reduce customer effort.

Whereas "customer interaction recording" simply involves chronicling customer data, "customer relationship management" involves using that data to eliminate existing pain points while better anticipating future needs.

Effective CRM solutions provide agents and systems with a sense of where and how customers connect and what issues tend to arise when they do. More importantly, they help businesses mitigate these concerns so that the pathway from "problem" to "resolution" is as frictionless as possible.

Their ability to increase personalization further reduces effort. When agents and systems already have specific insights about customers and their issues, customers will not have to waste time and effort repeating contextual information.

CRM also helps organizations incorporate predictive and proactive elements into their experiences. By informing agents of opportunities to proactively solve problems or collect customer information, customer-centric CRM tools prevent customers from needing to reconnect – and exert more effort – down the road.

> "
> After you have captured your [customer's identity], you can begin to run predictive analytics against this data to understand what the customer may need in the future to help them make purchasing decisions, or which agent they should be routed to or even what information to present to the agent when the interaction is started,"
> says Seeds.

CHANNEL SPANNING:

While the jury continues to deliberate some aspects of the "omnichannel" experience, one tenet is universally clear: customers demand the ability to seamlessly transition between contact channels.

The process of moving from channel to channel should be easy. More importantly, it should not require the customer to restate any information or endure any other form of undue effort. No matter where or when the interaction is taking place, the business should know who the customer is, how the customer has previously connected, and why the customer is currently engaging.

Effective CRM solutions empower this seamless, cross-channel experience. They capture data from all channels and report data to all touch points. They allow for the creation of singular "customer profiles" that follow the customer wherever they choose to connect.

This channel-spanning requirement extends to self-service tools like chatbots.

MAXIMIZING—AND ANTICIPATING— "MOMENTS OF TRUTH":

Customer relationships are not merely series of interactions. They are legitimate bonds between brands and customers that span different interactions, issues and points of communication.

They, most notably, involve key moments of truth.

These interactions play a uniquely important role in determining the strength of the relationship. They determine whether the customer views the business as a supplier or as a trusted partner.

Effective CRM utilities must help a business not only identify but maximize these moments of truth. They should reveal how customers feel and what they want during these key points of contact, in turn signaling the type of experience the business must provide.

> " [Integrated CRM will help] the agents to look at the information holistically," says Davis. "They will be able to address the issue that the customer has initially" but also be able to add value to the overall journey.
>
> "I notice you have $X in your checking account; if you switch to a premiere account, you will save $Y," illustrates Davis regarding how an integrated CRM can help agents add value and reduce effort.

ADOPTION AND INNOVATION:

To borrow a cliché, change is the only constant when it comes to the customer experience.

Customer demands are always evolving, and customer-centric brands keep pace with this evolution. They leverage CRM not only to help deliver what customers once wanted but to identify – and adapt to – changes in what they want.

Particularly elite brands go one step further. By digging deep into customer sentiment and behavior, they proactively uncover opportunities to deliver even more value for customers. They determine what customers really want (but have not yet articulated) and innovate accordingly.

In addition to providing data to justify and inform these transformative experiences, robust CRM solutions make the innovation possible. The solutions and strategies are flexible enough to remain valuable and relevant even as key aspects of the customer experience change.

DOES IT IMPROVE THE AGENT EXPERIENCE?

Creating value for the customer is the ultimate goal of CRM strategy — and of the customer experience at large.

"

Operationally, everything the organization does should be aimed at organizational competence from the customer point of view and being authentic in delivering the value you claim to deliver," declares Seeds. "Too many organizations try to fake their way to providing value which is quickly discovered. Customers are rarely fooled by such as approach."

As the representatives directly communicating with customers, agents play a critical role in delivering this value. Their performance directly drives satisfaction, while also signaling the extent to which the business cares about its customers.

Both factors — the value being created and the appreciation being communicated — determine the strength of the relationship between brand and customer.

The agent experience, therefore, represents a pivotal concern for CRM strategy — and the associated system. Agents who can easily get the information they need are happier, more productive and ultimately more capable of building relationships with customers.

Leveraging CRM to improve – rather than hinder – the agent experience is undeniably important. It is also an undeniable challenge for many organizations.

Resentment toward backend systems – particularly the CRM solution – is commonplace in sales and service environments. In recent interviews with CCW Digital, numerous customer contact executives confirm agent experience challenges.

Erin Geddes of Schneider Electric reveals that her agents must deal with various, complex systems in order to properly help customers who escalate from self-service.

> If you want to replicate the experience so you can talk a customer through it, you're going to need to access a bunch of systems," says Geddes. "We have too many different tools to navigate.
>
> "We have an ERP system, a CRM system, an external CRM connection to see and reference certain aspects of the offer, product guides and more."

Reducing this complexity is the key to improving the agent experience, which will in turn boost the customer experience.

> We have done a lot [to reduce effort] for customers," notes Geddes, whose goal is now to take a step back – and reduce effort internally.

Davis faces the same challenge in his organization: agents need to consult multiple systems to get the necessary information.

> We have several different units in our business, and we have many different systems within each of those units," reveals Davis. "From an agent perspective, there are about 13 different systems you'd have to log into periodically throughout your day.
>
> "Our aim is to create a singular dashboard."

That consolidation would, in and of itself, elevate the agent experience. Optimal CRM tools then go one step further in providing agents with the specific *information they need* based on context.

Effort, which factors heavily into the customer experience, also impacts the quality of the agent experience. Agents are not looking to add to their workloads. More importantly, they do not expect so-called empowerment tools to complicate the process of doing their jobs. CRM systems should be easy to access and leverage, and in turn make agents feel more empowered and productive.

Integrating the CRM tool with the contact center platform achieves this goal.
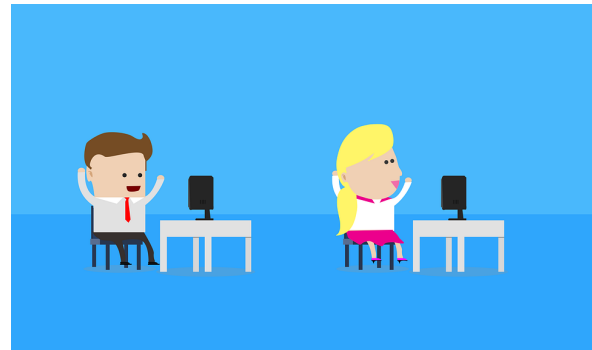
To the extent that they do require additional work from the agents, CRM utilities should offer a very clear "return on investment." Agents should know there will be fruits of the labor associated with inputting data and navigating the system.

To ensure a CRM solution is providing this value, Seeds recommends focusing on the "give-get" ratio.

> " I go from just having a screen pop to tell me it's a call for [a particular line of business] to now knowing exactly which customer is calling," explains Davis. "The desired system gives agents the customer's profile information, details on the customer's last four interactions and the specific greeting to provide when picking up the phone.
>
> "From an agent perspective, it becomes extremely easy to serve the customer."

> " We have found that for every single group of data that you require from the agent or sales rep, you need to provide at least 5 to 7 pieces of data to enable them to be better and not have to spend so much time searching different systems for what they need to have at their fingertips," explains Seeds.

"

If you want to use CRM to improve the agent experience and their ability to interact effectively with the customer through showing competency, then giving the agent more data than you are expecting them to capture is key."

"

Concurring with the give-get framework, Davis adds, "I want to be able to make sure the agents have the information they need readily available to them - so that they can help the customer move on" as quickly as possible.

Organizations that do not maximize this ratio are, essentially, reducing their CRM strategy to an "interaction recording" endeavor. They are burdening agents with a task that yields no empowerment.

These menial, fruitless tasks will frustrate agents. Worse, they will prevent agents from delivering the best possible experiences. Without actionable, relevant insights, agents will be unable to personalize experiences, identify pain points and, ultimately, build customer relationships.

Additional agent experience focuses include ensuring the system allows agents to handle concurrent sessions, reduces the complexity of processes, establishes "best practices" based on past interactions, reduces inaccuracies, and requires minimal agent training time.

DOES IT CAPTURE (AND EMPOWER) THE ENTIRE CUSTOMER EXPERIENCE JOURNEY?

"

CRM grew as a way for individuals to track and manage customer interactions, mainly across sales, marketing and customer service," explains Seeds. "This was acceptable in a world where those engagements were siloed and the interaction itself was the sum of the customer's view of the organization.

> " "With the rise of mobility and the hyper connected consumer, businesses now have the challenge of maintaining consistency across multiple interactions pertaining to the same issue, across many new channels of communication. To juggle all these communications seamlessly, CRM had to fundamentally change to become the sole source of data, or the 'golden-record' of customer data. "

Worthwhile CRM systems capture all forms of customer intelligence from all contact channels. They also deliver useful data at all stages of the journey. They enable the business to constantly determine –and then provide – the best information, response, good or service to the customer at the given moment.

Today's organizations embrace the idea of a customer experience journey, which means they embrace the role all direct and indirect touch points play in shaping customer relationships. They know that customer relationships are not strictly relevant in the voice channel or exclusively useful for automating marketing messages.

CRM solutions, accordingly, cannot be limited in scope. They cannot be exclusive to certain portions of the customer experience journey; they must empower all interactions.

> " The new CRM consolidates the entirety of the customer facing engagements, allowing for anyone across any department to have the information they need, at the right time to provide an exceptional experience," adds Seeds.

Citing a professional peer, Davis notes that some best-in-class organizations employ cross-channel agents. They seek employees who are great interacting with customers in general rather than those who are masters of one specific channel.

> " Today they may be doing social, next week they may be doing calls, the week after they may be doing chat," notes Davis.

If channel-and-function-spanning agents do not have access to the same data in the same system, they will be unable to support customers in this fluid, omnichannel, journey-oriented environment.

This requirement is far more than a mere call for CRM systems to be cross-channel and cross-functional. It also mandates versatility. CRM solutions and strategies must be agile, scalable, and capable of helping the business become the brand a customer needs.

This ability to recognize context and adapt accordingly is a key point of differentiation between a supplier and a trusted provider.

DOES IT TELL A STORY?

CRM strategies go beyond data recording.

They also go beyond data reporting.

> " Just because you pour all the data into the same container, doesn't mean you can connect the dots," explains Seeds.

The goal should not simply be to create an accessible archive of customer information but to transform information into actionable insights that can markedly elevate the overall experience.

The goal should be to develop a CRM strategy that tells *stories.*

These stories drive agents and systems to the best possible action for a given customer at a given time. Tailored to specific customers, contexts, issues, channels or functions, they empower the business to truly connect with customers.

Evidenced by resounding support for dashboard technology, "data presentation" represents a major concern for customer contact functions. They are not simply looking for ways to manage data; they are look for ways to make sense of the data they have.

Storytelling capabilities ensure the CRM system is a resource rather than burden for agents. They ensure it helps agents better perform their jobs rather than asking them to perform the additional task of turning broad data into usable insights.
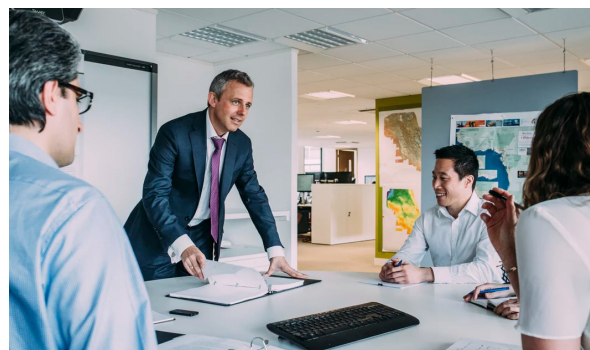
CRM: The Relationship Roadmap

Customer relationships are the product of experiences that create unique, demonstrable value for customers. They come from the perspective that transactions are not isolated events but springboards for long-term connections.

Customer relationship management strategy must help create this value and forge these connections.

Chronicling customer data and interactions is a necessary component of CRM strategy, but it is not the goal of the endeavor. The real goal – the real difference-maker – is creating a mechanism for using this data to create better experiences throughout the journey.

CRM solutions – often the focus of discussions about CRM – must contribute handsomely to this objective. Their value comes not from their ability to store data but from their ability to *frame* that data in the most valuable manner possible.

The end result will be more lucrative and permanent relationships with customers.

The Relationship Roadmap
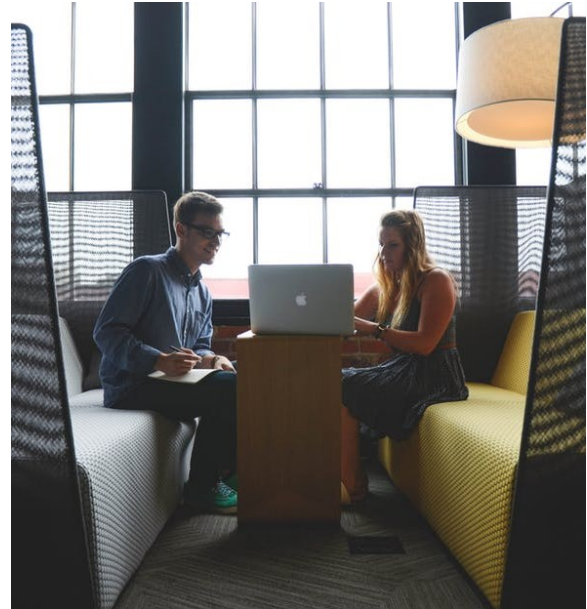
IDENTIFY THE BRAND PROMISE:

What "value" does your business promise to your customers?

ESTABLISH KEY CUSTOMER EXPERIENCE GOALS:

What defines a "good" customer experience in the context of your product and customer base? What would make the customer want to commit to a relationship with your business?

MAP THE CUSTOMER EXPERIENCE JOURNEY:

What does your business' customer journey entail? Why, where and in what context do customers interact with your business?

IDENTIFY THE KEY DATA POINTS:

As the customer embarks on the journey, what opportunities exist to capture data? What data is directly communicated by the customer? What can be directly surmised by the agent? What data can only be acquired using technology?

CONNECT THE DOTS:

Is data from the aforementioned touch points being funneled into the same system? Can an agent or system access all relevant intelligence from a single "screen" or utility?

AMPLIFY THE ACCESS:

Do agents see the CRM solution as a source of empowerment or as a burden?

The Relationship Roadmap

FRAME THE NARRATIVE:

Does your system simply give agents access to data they have already reported? Or, does it transform the data into actionable, relevant, contextual insights?

ENSURE CUSTOMER FLUENCY:

Is the CRM solution tailored to the specific needs, wants and expectation of the business and its customers?

FUEL THE "MOMENTS OF TRUTH":

Can agents and systems get access to the specific insights they need, exactly when they need them? Does the data put these "representatives" in position to deliver value?

ANTICIPATE NEEDS:

Can the CRM solution communicate data beyond the scope of the individual interaction? Can it help agents not only create additional value for the customers with whom they are speaking but forecast the types of customers, issues and expectations they will encounter next?

FOSTER GROWTH:

Will the CRM tool be affected by changes in other contact center systems? Can it accommodate growth or restructuring within the contact center environment? Does it provide a framework for identifying opportunities, testing ideas and implementing strategies for elevating the customer and agent experiences?

In the words of Seeds, CRM built in accordance with this roadmap will "consolidate the entirety of the customer facing engagements, allowing for anyone across any department to have the information they need, at the right time to provide an exceptional experience."

The Special Report Series

Our readers are action-oriented and results-driven: they do not simply want to learn about challenges — they want to leverage innovative thinking to achieve unprecedented success. As a result, we introduced the CCW Digital Special Report series to transform today's challenges into tomorrow's opportunities. Featuring insights from world-class executives and exclusive research, the reports dive deeply into pressing CX and contact center topics. New reports - each focusing on a unique topic - will be published twice monthly.

You can download these Special Reports here.

Customer Engagement	**Workforce Management**	**Employee Engagement**	**Frictionless Experience**
July 5, 2017	July 17, 2017	August 1, 2017	August 15, 2017

Customer Loyalty	**Future of CX Employees**	**Multilingual Engagement**	**Chatbots**
September 1, 2017	September 15, 2017	October 2, 2017	October 16, 2017
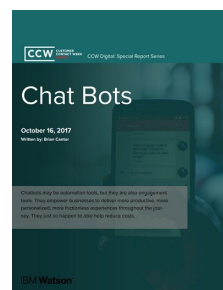
Voice of the Customer	**CRM**	**Agent Performance**	**Personalization**
November 1, 2017	November 15, 2017	December 1, 2017	December 12, 2017

2018 Special Reports Calendar

Special Reports Calendar is subject to change.
Updated as of 11/8/17

Publish Date	Report Topic	Sponsorship Deadline
Jan. 2	2018 Predictions	**Dec. 15, 2017**
Jan. 15	Retail CX	**Dec. 20, 2017**
Feb. 1	Omnichannel	**Jan. 18, 2018**
Feb. 15	Travel Disruption / CX in Space	**Feb. 1, 2018**
Mar. 1	CX Automation	**Feb. 15, 2018**
Mar. 15	Agent Experience	**Mar. 1, 2018**
Apr. 2	Brand Reputation	**Dec. 15, 2017**
Apr. 16	Outsourcing	**Mar. 30, 2018**
May 1	Lux	**Apr. 13, 2018**
May 15	Agent Performance Pt. 2	**Apr. 27, 2018**
Jun. 1	Customer Journeys	**May 18, 2018**
Jun. 15	Self-Service	**Jun. 1, 2018**
Jul. 1	FP3 Experience	**Jun. 15, 2018**
Jul. 15	Outbound & Proactive Engagement	**Jul. 2, 2018**

2018 Special Reports Calendar

Publish Date	Report Topic	Sponsorship Deadline
Aug. 1	Actionable Analytics	Jul. 19, 2018
Aug. 15	Customer Complaints	Aug. 1, 2018
Sep. 4	Chatbots Pt. 2	Aug. 21, 2018
Sep. 17	eCommerce & the Digital CX	Sep. 3, 2018
Oct. 1	Learning & Development	Sep. 18, 2018
Oct. 15	Remote Agents	Oct. 2, 2018
Nov. 1	Future Workspaces	Oct. 18, 2018
Nov. 15	Knowledge Management	Nov. 2, 2018
Dec. 3	Live Chat	Nov. 16, 2018
Dec. 17	CX Automation Pt. 2	Dec. 3, 2018

SPONSORING A SPECIAL REPORT:

PRIMARY SPONSOR

A senior executive from your company will be interviewed by one of our CCW Digital Analysts. These thoughts and comments will be incorporated throughout the report. Your executive's analysis will be inserted into the final copy. Your company logo will be on the front page of the report.

SECONDARY SPONSOR

Branding—Your company logo will be on the front page of the report.

INTERESTED IN SPONSORING? CONTACT US AT INFO@CCWDIGITAL.COM

Upcoming Events:

CCW Executive Exchange
December 3-5, 2017
OMNI Nashville Hotel, Nashville, TN
www.ccwexecexchange.com

CCW Learning
December 4-6, 2017
Omni Mandalay Hotel at Las Colinas, Dallas, TX
www.customercontactlearningweek.iqpc.com

Customer Contact Week - New Orleans
January 22-25, 2018
Hyatt Regency, New Orleans, LA
www.customercontactweekwinter.com

CX Travel & Hospitality
February 24-March 1, 2018
Dallas, TX
www.cxtravel.iqpc.com

Customer Contact Week - Las Vegas
June 18-22, 2018
The Mirage, Las Vegas, NV
www.customercontactweek.com

About the Author:

Brian Cantor, Principal Analyst

Customer Management Practice

Brian Cantor authors the special reports series. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives. Citing this proprietary research, Brian authors the special report series.

Brian additionally serves as managing editor and director for CCW Digital, which is the largest web publication and community for customer experience professionals. CCW Digital's articles, commentaries, infographics, executive interviews, webinars and online events reach a community of over 140,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.
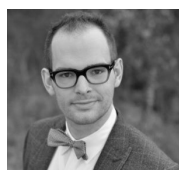
Meet our Analysts:

Brian Cantor
Principal Analyst &
CCW Digital Director

E: Brian.Cantor@iqpc.com

Michael DeJager
Principal Analyst,
Experience Design Series

E: Michael.DeJager@iqpc.com

Lisa Schulman
Senior Analyst,
CCW Series

E: Lisa.Schulman@iqpc.com

Nadia Chaity
Senior Analyst, Customer
Delivery & CCO Series

E: Nadia.Chaity@iqpc.com

Amber Morgan
Senior Analyst,
CX Series

E: Amber.Morgan@iqpc.com

Get Involved:

Simon Copcutt
Head of Strategic Accounts

E: Simon.Copcutt@iqpc.com

Max Ribitzky
Business Development
Director

E: Max.Ribitzky@iqpc.com

Don Alderson
Digital Strategist

E: Don.Alderson@iqpc.com